

Texas SHARE

DOCUMENT MANAGEMENT SOLUTIONS

RFP #2022-003

Sherri Taylor, President | Armstrong Archives, LLC | January 19, 2022



REQUEST FOR PROPOSALS
For
Document Management Solutions
RFP # 2022-003

Sealed proposals will be accepted until **2:00 PM CT, Wednesday, January 19, 2022** and then publicly opened and read aloud thereafter.

Armstrong Archives, LLC

Legal Name of Proposing Firm

Sherri Taylor

President

Contact Person

Title

972-242-7179

staylor@aarchives.com

Telephone Number

E-Mail Address

1515 Crescent Drive, Carrollton, TX 75006

Street Address of Principal Place of Business

City/State

Zip

1515 Crescent Drive, Carrollton, TX 75006

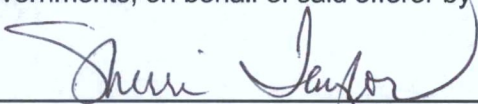
Complete Mailing Address

City/State

Zip

Acknowledgment of Addenda: #1 ☒ #2 ☐ #3 ☐ #4 ☐ #5 ☐

By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct, and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.


Authorized Signature

TAB A – Statement of Work

Armstrong Archives is pleased to submit the enclosed Proposal for Bid Item #1: Document Storage and Services, and Bid Item #2: Document Imaging/Digitization Services. We will not be Submitting anything for Bid Item #3: Document Destruction Services.

Bid Item #1: Document Storage and Services

Armstrong Archives ("AA") has more than 25 years of experience in Document Storage and Services in the North Texas area. As a Records Management Independent we have worked with many companies, both large and small, in all types of industries, and with local Municipalities and Government Agencies. We offer complete turn-key services with the ability to manage projects from beginning to end, or just pieces depending upon the clients need. AA has gone out of the county and out of State to gather and ship records. We can index and record on a box level, file level, or even document level basis. We have all the supplies and experience to convert records from a disorganized storage shed into a cleaned up boxed and inventoried library of records.

Our clients have full access to their records 24/7 via our secure web portal that will allow authorized individuals to place orders, review inventory, run reports, and even review invoices on an as needed basis. All data is secured and backed up on our proprietary cloud systems. Access to records is available through personalized delivery, tracked shipping (UPS, FedEx, etc.), scan-on-demand, or customer Pickup. Standard Services is Next Day with Same Day and 2-hour service available. Emergency services are available after hours and on Holidays.

Bid Item #2: Document Imaging/Digitization Services

Armstrong Archives began offering Document Imaging and Digitization services more than 10 years ago. Again, we offer turn-key services and can pick up and transport your documents to our facility where we will store the records until the scanning is complete, and then store them again for up to six months while you review and check the work. In between, we will Prep, Scan, QC, and perform OCR on the paper files giving you a fully searchable library of documents. Individual indexes will be determined by the customer. We have capability to image both standard size documents, index cards, and large drawings. We prefer to save the images to an external hard drive provided to the client and allow them to load them into their system as appropriate. We find that the customer knows their computer systems and requirements much better than we do. But, we also offer image delivery through a DropBox download or computer to computer upload. AA has managed scanning projects for Defense Contractors, State Agencies, Litigation Records, Corporate Records, and Individual School Districts.

TAB B – Executive Summary

In 1996, Armstrong Relocation, a 70-year-old multi-million-dollar national support services company, partnered with, and funded a collaboration with Sherri Taylor. Sherri is the Founder and President of Armstrong Archives. Sherri has been in the record management industry for over thirty-five years. Sherri has been a founder, shareholder, and board member of the “NRC”, National Records Centers with a global out-reach. A board member of PRISM, the Global Trade Organization for Information Management Companies, and is the current President of ARMA – Dallas Chapter, the Association for Record Managers and Administrators.

Armstrong participates with ARMA, ALA, TXHIMA, and we are **a woman owned business**. AA is a full service organization offering delivery, pick-up, inventory, re-boxing, data collection, litigation hold and support, retrieval/refile, scanning, destruction, and customer service access via in-person, phone, fax, or email. We have no automated answering systems during normal working hours, and strive to be responsive and flexible in meeting our customer needs. If a service or project item is required that is not on our standard “Schedule” of services, we will work with you to offer what you need at a reasonable rate.

As a “Independent” Records Management company, AA is able to adjust to your needs easily and smoothly. There is not a long chain of command for approvals for things outside the “norm”. You deal with the same set of local employees on a day-to-day basis instead of call center staff who are unfamiliar with your business processes.

TAB C – Key Personnel

ALL EMPLOYEES go through a strict pre-employment regimen including full background check, drug screen, completion of EEOC and Confidentiality paperwork.

Sherri Taylor, President of Armstrong Archives, one of the largest independent records and information management companies in the Dallas/Ft Worth area. Armstrong Archives offers records management, document imaging, and document destruction, and is her second record company start up in over 35 years in the industry. Sherri has been on the PRISM Conference Planning committee for several years, teaches education sessions at industry events, and served as the Chairman. She served on the Board of Directors of the National Records Centers for 5 years, and on the Board of Directors of PRISM International for 3 years, and is currently President of the Board of Directors for ARMA Dallas.

Cheri Adams, Office Manager has been with Armstrong Archives since January 2015. She oversees all aspects of our office including customer services, billing, and employee management. She earned her Bachelor's Degree in December 2014 in General Business from Texas Woman's University. In the future, Cheri hopes to own her own non-profit animal rescue business.

Trent Davis, Special Projects and New Customer Manager joined the Armstrong Archives team in June of 2017. He is the Special Projects Manager in charge of scheduling and setting up all the new accounts. Trent started his records management career working in the oil and gas industry beginning in 2013. Prior to starting his career, Trent served eight years in the United States Army. Trent is currently a Member of ARMA and is the VP of Community Relations and Treasurer on the ARMA Dallas Board of Directors. Trent received his Bachelor's degree in Business at DeVry University in Irving, TX.

Jason Kelly, IT and Scanning Manager has been an employee of Armstrong Archives since May of 2010. He is in charge of all I.T. operations as well as the Imaging Department. Jason graduated in 2004 with an Associate Degree in Computer Networking and Information Technology from ITT Tech in Arlington, Texas. He has been working in the I.T. field since 2003 and initiated and built the imaging department at Armstrong Archives in 2010.

Michael Morgan, Operations Manager has been employed with Armstrong Archives since February of 2011. In March of 2014 he became the Operations Manager. He manages an inventory of over 500,000 boxes, four warehouses, and a team of warehouse personnel. Michael is a current member of the International Facility Management Association.

TAB D – Technical Proposal

The Armstrong Archives facilities and processes include the following:

- All buildings, property, equipment (office and warehouse), and vehicles are owned by Armstrong Archives. Nothing is rented or leased.
- All buildings are of concrete slab, tilt wall construction, and 100% sprinkler fire protected.
- Security systems included 360° coverage with motion sensors, glass break sensors, and hi-def color cameras. Cameras are accessible remotely in real time.
- All fire protection and security systems are monitored 24/7 with alarms directed automatically to police and fire.
- Fire protection systems are inspected and certified annually.
- Long term member of ARMA (Association of Record Managers and Administrators), NRC (National Records Centers), iSIGMA (formerly PRISM International), BBB (Better Business Bureau), WEBNC (Women's Business Enterprise National Council).

1. Document Storage and Service – Full turn-key service.

- Gathering, consolidation, boxing, and transport of records.
- Work with Client to identify inventory data, tracking, and reporting requirements.
- Inventory or indexing of records on a carton or file folder level to input into our online computer system.
- Placement on shelves in a fully fire-protected and secured warehouse.
- Retrieval / Re-file of inventory as needed.
- Delivery, Pick-up, of new items, refile items, supplies, etc. as needed.
- Requests for record services may be placed online, or by phone, fax, or email.
- Security protocols strictly following only allowing "authorized individuals" to access any account information, order services, or make account changes.
- Inventory will account multiple fields of data including:
 - o department
 - o category,
 - o date range,
 - o series,
 - o description,
 - o destruction date,
 - o customer ID number,
 - o plus, many customizable fields.
- Billing is divisible by department or cost codes.
- Legal Hold designation on inventory is available.

TAB D – Technical Proposal (Con't)

2. Document Imaging/Digitization – Full turn-key service.

- Complete boxing, pick-up, loading, and transportation of records as required.
- Cartons will be inventoried and placed on shelves while waiting for processing.
- All records will be accessible to the client while waiting for processing.
- A sample box/file can be imaged first and provided to the customer for review before moving forward with the remainder of the project. This allows for review and processing changes before the bulk of the work proceeds.
- All records are prepped (remove staples, paper clips, etc.) and separator sheets installed between documents.
- Records are scanned. It will be determined during the sample as to what and the type of scan:
 - o Folder label
 - o Black/white or full color
 - o One or two sided
 - o DPI density
- After scanning images are reviewed for quality and consistency (dark or skewed images, double feeds, etc.)
- Indexes are added
- OCR (Optical Character Recognition) performed
- Carton returned to shelf for six months review storage
- Images delivered to customer in a predetermined format (external hard drive, dropbox, cloud, email, etc.)
- Scan library maintained on Armstrong Archives server for 1 year.

TAB E – References

1. **Atmos Energy** (Storage & Scanning)
Angie Middleton
5430 LBJ Freeway #160
Dallas, TX 75240
angie.middleton@atmosenergy.com
214-641-9582
2. **Texas Department of Public Safety** (Scanning)
Gracie Perez
5805 North Lamar
Austin, TX 78752
gracie.perez@dps.texas.gov
512-424-5628
3. **Bell Helicopter** (Scanning)
Casey Krier
600 E Hurst Blvd
Hurst, TX 76053
Ckrier01@bellflight.com
817-280-1899
4. **City of The Colony** (Storage & Destruction)
Tina Stewart
6800 Main Street
The Colony, TX 75056-1219
tstewart@thecolonytx.gov
972-624-3106
5. **Richardson Independent School District** (Scanning)
Diana Jaime
701 W. Belt Line Rd
Richardson, TX 75080
Diana.Jaime@RISD.org
469-593-7504

TAB F – Document Storage Pricing

1. <u>Document Storage</u>		Number of Cartons		
<u>Warehouse Storage</u>		<u>1-1,000</u>	<u>1,001-10,000</u>	<u>10,001+</u>
Standard Record Carton (1.2 Cubic Feet)	0.32	0.28	0.25	
Letter Size Trans-file (2.4 Cubic Feet)	0.64	0.56	0.50	
Legal Size Trans-file (3.6 Cubic Feet)	0.96	0.84	0.75	
Other Sizes (per Cubic Foot)	0.32	0.28	0.25	
 <u>Climate Control Storage</u>				
Standard Record Carton (1.2 Cubic Feet)	1.16	1.02	0.90	
Letter Size Trans-file (2.4 Cubic Feet)	2.32	2.04	1.80	
Legal Size Trans-file (3.6 Cubic Feet)	3.48	3.06	2.70	
 2. <u>Document Activity Services</u>				
Retrieval/Refile – Standard Service		1.50/item		
Retrieval – Same Day (request by 11:00 a.m.)		3.50/item		
Retrieval – 2 Hour (Request by 3:00 p.m.)		6.00/item		
 File Level Indexing		0.30/each		
 Re-Boxing (Includes Supplies & Labor)		6.50/each new box		
 Scan-on-Demand – 1 st Page		1.50/1 st Page		
Scan-on-Demand – Additional Pages		0.22/each additional		
 3. <u>Transportation</u>				
<u>Trip Charges – Within 40 miles one way – Each additional mile \$1.00</u>				
Standard Service Round Trip Fee		20.00		
Same Day Round Service Trip Fee		30.00		
Two Hour Service Round Trip Fee		40.00		
 Handling Fee – (Loading/Unloading)		0.75/each		
 4. <u>Supplies</u>				
Standard Record Cartons (12"W x 16"L x 11"H)		3.50/each		
Standard Record Cartons (Bundle of 25)		75.00/bundle		
Barcode Labels, Index and Climate Control Labels, Inventory Forms, Internet Database Login		No Charge		

TAB F – Document Storage Pricing (Con't)

5. Labor

Casual Labor	35.00/hour
Skilled/Clerical Labor	42.00/hour
Supervisor Labor	55.00/hour

6. Other

Additional Services for which no specific rate is listed will be performed at an hourly rate, as listed above. 24-hour service is available but should be scheduled in advance whenever possible. All "after hour" rates are subject to a 4-hour minimum as listed below.

Early after hours (5:00 p.m. – 12:00 midnight, Monday-Friday)	45.00/hour
Late after hours (12:01 a.m – 8:00 a.m., and weekends)	68.00/hour
Holidays (all hours)	155.00/hour

Specific volume projects will be quoted independently based upon time, size, and scope.

****Additional Billing Notes****

- All charges are **flat rate per "item"**, not per cubic foot. We have provided a cubic foot price as requested for comparison purposes, but actual invoices will be per "item".
- **FREE** access to our Secure Inventory Management System & unlimited users.
- **NO** Administration Fees
- **NO** Fuel Surcharges
- **NO** Report Fees
- **NO** Automated Answering System
- **NO** Service Minimum

TAB F – Document Imaging/Digitization Service Pricing

Armstrong Archives strives to simplify the pricing process for scanning projects as much as possible. Below is a quote for a "Standard Scanning Project" of approximately 50 standard 1.2 cubic foot record cartons. Each scanning project is different with its own specific requirements. This is what you can expect for this size job. We will quote each job separately and base it on the quantity, complexity, number of indexes required, and the time frame allowed to complete. This way we can give each project detailed attention and you the best possible rate.

<u>SCANNING Services - Scope of Project</u>	Approx Pgs Box	Cost Per Page	Est. Box Total	# Boxes	Approx Cost
Approximately 50 Standard Record Cartons	2,000	\$ 0.080	\$ 160	50	<u>\$ 8,000</u>

to be scanned into a .pdf format @ 200 dpi, b/w or color.

Armstrong Archives can provide this service by performing the processes listed below.

Services Included in Project:

- Place files into Cartons
- Inventory and Load Cartons
- Transport to Armstrong Archives
- Document Prep for Scanning
(removal of staples, placement of separator sheets, etc.)
- Scanning to .pdf Format @ 200 dpi
- Indexing (Up to 3 ea.):
 - Category (A/P, Sales, HR, Tax, etc.)
 - Item Name (Vendor, Employee, Customer, etc.)
 - Date
- Quality Control Review (for Bad or Skewed Images)
- Optical Character Recognition (Keyword Search)
- Box Repacking
- Images Stored according to Client Instructions
- Boxes Stored for 6 Months
- Box Disposition after 6 Months / Return, Shred, or Store

Notes:

- Any items needed before project is complete can be retrieved and scanned.
- A "sample" box may be processed at no charge before signing agreement.
- Prices are "all-inclusive" except for the procurement of an external hard drive.
The customer may provide their own, or we will obtain and provide at cost.
- Pricing is "per page" so actual page count may be higher or lower than estimate.

TAB G – Attachments I - X

**ATTACHMENT I:
INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

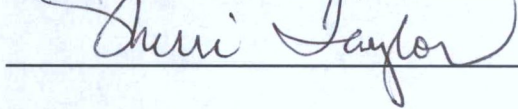
Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance may be requested to be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 6.04.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



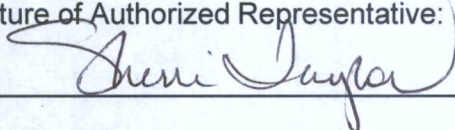
Date: 1-18-22

**ATTACHMENT II:
CERTIFICATIONS OF OFFEROR**

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date:

1-18-22

ATTACHMENT III:
CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

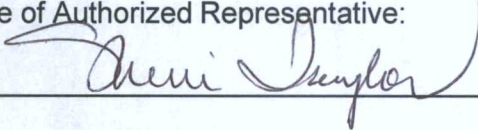
1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date:

1-18-22

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

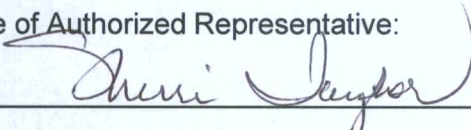
The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying", in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date: _____

1-18-22

**ATTACHMENT V:
DRUG-FREE WORKPLACE CERTIFICATION**

The Armstrong Archives, LLC (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the Armstrong Archives, LLC (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

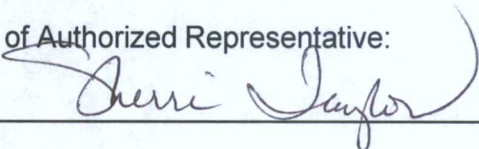
Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date: 1-18-22

**ATTACHMENT VI:
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST**

The undersigned certifies that, to the best of his or her knowledge or belief, that:

"No employee of the contractor, no member of the contractor's governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents".

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

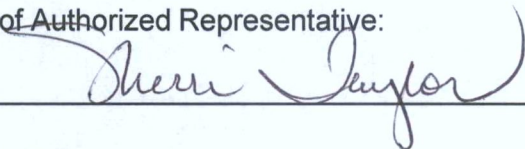
No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date: 1-18-22

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

Armstrong Archives, LLC

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

N/A

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

N/A

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐

Yes

☐

No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐

Yes

☐

No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

N/A

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Shemi Taylor
Signature of vendor doing business with the governmental entity

1-18-22
Date

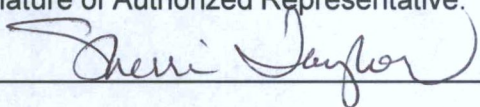
**ATTACHMENT VII:
CERTIFICATION OF FAIR BUSINESS PRACTICES**

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

Armstrong Archives, LLC

Signature of Authorized Representative:



Date:

1-18-22

28

**ATTACHMENT IX:
HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED
BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB companies should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

Submitter must include a copy of its minority certification documentation as part of this solicitation.

If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

☐ Minority-Owned Business Enterprise
☒ Women-Owned Business Enterprise
☐ Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

Sherri Taylor
Authorized Signature

Sherri Taylor
Typed Name

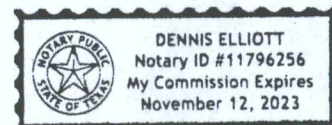
1-17-22
Date

Subscribed and sworn to before me this 17th day of JANUARY (month), 2022 in

Carrollton (city), Dallas (county), TEXAS (state).

Dennis Elliott

SEAL



Notary Public in and for DALLAS (County),

State of TEXAS Commission expires: 11/12/23

WBENC

WOMEN'S BUSINESS ENTERPRISE
NATIONAL COUNCIL

JOIN FORCES. SUCCEED TOGETHER.

hereby grants

National Women's Business Enterprise Certification

to

Armstrong Archives, LLC

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).

This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Certification Granted: October 11, 2012

Expiration Date: October 11, 2022

WBENC National Certification Number: 2005121089

WBENC National WBE Certification was processed and validated by Women's Business Council - Southwest, a WBENC Regional Partner Organization.



Authorized by Debbie Hurst, President Women's Business Center



WOMEN'S
BUSINESS
COUNCIL
—
SOUTHWEST

NAICS: 493190, 518210
UNSPSC: 78131804



Great Lakes
Women's
Business
COUNCIL

GREATER
WOMEN'S
BUSINESS
COUNCIL

WBENCFLORIDA
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WBENC METRONY
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WBENC GREATER DMV
WOMEN'S BUSINESS ENTERPRISE COUNCIL



WBENC EAST
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WBENC ORV
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WBENC PACIFIC
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WOMEN'S
BUSINESS
DEVELOPMENT
CENTER

WBENC SOUTH
WOMEN'S BUSINESS ENTERPRISE COUNCIL

WBENC WEST
WOMEN'S BUSINESS ENTERPRISE COUNCIL



WOMEN'S BUSINESS ENTERPRISE
NATIONAL COUNCIL

JOIN FORCES. SUCCEED TOGETHER.

**HEREBY GRANTS
WOMAN OWNED SMALL BUSINESS (WOSB) CERTIFICATION TO**

Armstrong Archives, LLC

The identified small business is an eligible WOSB for the WOSB Program, as set forth in 13 C.F.R. part 127 and has been certified as such by an SBA approved Third Party Certifier pursuant to the Third Party Agreement, dated June 30, 2011, and available at www.sba.gov/wosb.

The WOSB Certification expires on the date herein unless there is a change to the SBA's regulation that makes the WOSB ineligible or there is a change in the WOSB that makes the WOSB ineligible. If either occurs, this WOSB Certification is immediately invalid. The WOSB must not misrepresent its certification status to any other party, including any local or State government or contracting official or the Federal government or any of its contracting officials.

Majority Female Owner: Sherri Taylor

NAICS: 493190, 518210
UNSPSC: 78131804

Certification Number: W040106

Expiration Date: October 11, 2022



WOMEN'S
BUSINESS
COUNCIL
—
SOUTHWEST

Debbie Hurst, Women's Business Center
President

Pamela Prince-Easton, WBENC President & CEO

LaKesha White, Vice President, Certification

**ATTACHMENT X:
PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
CERTIFICATION**

This RFP and any resulting Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment.

Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g. phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.

The entity identified below, through its authorized representative, hereby certifies that no funds under this RFP or any resulting Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☒ The Respondent hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED
PERSON:



NAME OF AUTHORIZED PERSON:

SHERRI TAYLOR

NAME OF COMPANY:

ARMSTRONG ARCHIVES, LLC

DATE:

1-18-22

-OR-

☐ The Respondent hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON: -

NAME OF AUTHORIZED PERSON: -

NAME OF COMPANY: -

DATE: -

EXHIBIT A – Service Area Designation

EXHIBIT A

RFP 2022-003	Texas Service Area Designation or Identification		
Proposer Name:	Armstrong Archives, LLC		
Notes:	Indicate in the appropriate box whether you are proposing to service the entire State of Texas		
	Will service the entire State of Texas	Will not service the entire State of Texas	
		X	
	If you are not proposing to service the entire State of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	X
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	X
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	X
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands-Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

RFP 2022-003	Nationwide Service Area Designation or Identification Form						
Proposer Name:	Armstrong Archives, LLC						
Notes:	<p>Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.</p> <table border="1"> <tr> <td>Will service all Fifty (50) States</td> <td>Will not service Fifty (50) States</td> </tr> <tr> <td></td> <td>X</td> </tr> </table> <p>If you are not proposing to service to all Fifty (50) States, then designate on the form below the States that you will provide service to. By designating a State or States, you are certifying that you are willing and able to provide the proposed goods and services in those States.</p> <p>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.</p>			Will service all Fifty (50) States	Will not service Fifty (50) States		X
Will service all Fifty (50) States	Will not service Fifty (50) States						
	X						
Item	State	Region/MSA/City	Designated as a Service Area				
1.	Alabama						
2.	Alaska						
3.	Arizona						
4.	Arkansas						
5.	California						
6.	Colorado						
7.	Connecticut						
8.	Delaware						
9.	Florida						
10.	Georgia						
11.	Hawaii						
12.	Idaho						
13.	Illinois						
14.	Indiana						
15.	Iowa						
16.	Kansas						
17.	Kentucky						
18.	Louisiana						
19.	Maine						
20.	Maryland						
21.	Massachusetts						

22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		X
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

EXHIBIT B – Description of Services

The Armstrong Archives facilities and processes include the following:

- All buildings, property, equipment (office and warehouse), and vehicles are owned by Armstrong Archives. Nothing is rented or leased.
- All buildings are of concrete slab, tilt wall construction, and 100% sprinkler fire protected.
- Security systems included 360° coverage with motion sensors, glass break sensors, and hi-def color cameras. Cameras are accessible remotely in real time.
- All fire protection and security systems are monitored 24/7 with alarms directed automatically to police and fire.
- Fire protection systems are inspected and certified annually.
- Long term member of ARMA (Association of Record Managers and Administrators), NRC (National Records Centers), iSIGMA (formerly PRISM International), BBB (Better Business Bureau), WEBNC (Women's Business Enterprise National Council).

3. Document Storage and Service – Full turn-key service.

- Gathering, consolidation, boxing, and transport of records.
- Work with Client to identify inventory data, tracking, and reporting requirements.
- Inventory or indexing of records on a carton or file folder level to input into our online computer system.
- Placement on shelves in a fully fire-protected and secured warehouse.
- Retrieval / Re-file of inventory as needed.
- Delivery, Pick-up, of new items, refile items, supplies, etc. as needed.
- Requests for record services may be placed online, or by phone, fax, or email.
- Security protocols strictly following only allowing "authorized individuals" to access any account information, order services, or make account changes.
- Inventory will account multiple fields of data including:
 - o department
 - o category,
 - o date range,
 - o series,
 - o description,
 - o destruction date,
 - o customer ID number,
 - o plus, many customizable fields.
- Billing is divisible by department or cost codes.
- Legal Hold designation on inventory is available.

EXHIBIT B – Description of Services (Con't)

4. Document Imaging/Digitization – Full turn-key service.

- Complete boxing, pick-up, loading, and transportation of records as required.
- Cartons will be inventoried and placed on shelves while waiting for processing.
- All records will be accessible to the client while waiting for processing.
- A sample box/file can be imaged first and provided to the customer for review before moving forward with the remainder of the project. This allows for review and processing changes before the bulk of the work proceeds.
- All records are prepped (remove staples, paper clips, etc.) and separator sheets installed between documents.
- Records are scanned. It will be determined during the sample as to what and the type of scan:
 - o Folder label
 - o Black/white or full color
 - o One or two sided
 - o DPI density
- After scanning images are reviewed for quality and consistency (dark or skewed images, double feeds, etc.)
- Indexes are added
- OCR (Optical Character Recognition) performed
- Carton returned to shelf for six months review storage
- Images delivered to customer in a predetermined format (external hard drive, dropbox, cloud, email, etc.)
- Scan library maintained on Armstrong Archives server for 1 year.

EXHIBIT C – Service Questionnaire

EXHIBIT C
Service Questionnaire

Indicate the services you are able to provide:

SERVICE	YES	NO
Document Storage	X	
Document Imaging/Digitization	X	
Document Destruction		X

Respondents should address the following items in Tab D: Technical Proposal if they are applicable for the service(s) being proposed.

- Outline your Project Implementation and Transition Service plan (Project implementation, training, migration plan, system setup and activation / initial operational support).
- Outline your shipping, local delivery and/or pickup options.
- Outline your reconciliation/issue resolution procedures.
- Describe, in detail, your process for disposing of records.
- Will your shredders be able to handle stapled, bound, rubber-banded, clipped, etc. documents?
- What other types of material, other than paper, may be destroyed under this agreement? May these be mixed together with other material in the bins?
- For offsite destruction services, how do you ensure that material remains secured from the moment of retrieval until destruction is completed?
- Describe the security measures in place at your facilities.
- What type of inventory reports are available and what are the applicable fees?
- How does vendor intend to comply with retention/destruction schedule to include notification of expiration dates of document storage requirements?

Note: Respondent is not required to complete any questions that are not applicable to the services you are bidding.

EXHIBIT D **Basket Pricing Form**

Procurement No.:

NCT 2022-003

Respondent Name

Armstrong Archives, LLC

Sample Pricing based on customer location in Arlington, Texas

Item	Inventory		Description	Proposed Discount Pricing		
	QTY	UOM		UOM	Unit Price	Ext Price
1	100	Cubic Foot	Setup New Account - Initial Transfer of Records - Contractor Pickup Pickup and Delivery, Receipt and Data Entry of Records to Establish the Initial Storage Balance - One Time Fee Credit Offered	Cubic Foot TBD	0.00 0.00 TBD	0.00 0.00 TBD
2	50	Cubic Foot	Non Climate Controlled Storage - Standard Storage Box - Monthly Recurring Fee	Cubic Foot	\$ 0.27	\$ 13.50
3	50	Cubic Ft	Climate Controlled Storage	Cu Ft	\$ 0.97	\$ 48.50
4	10	Cubic Foot	Add Records to Existing Account - Contractor Pickup Retrieval, Pickup/Delivery, Processing, and Data Entry	Each	\$ 1.50	\$ 15.00
5	5	Cubic Foot	Retrieval & Refile of Storage Box - Contractor Delivers Retrieval, Pickup/Delivery, Processing, and Data Entry	Each	\$ 1.50	\$ 7.50
6	1	Per P/U Delivery	Contractor Pick up Or Delivery of Storage Box - Normal Turnaround Retrieval, Pickup/Delivery, Processing, and Data Entry	Each Box	\$ 0.75	\$ 0.75
7	50	N/A	Off-Site Shred of Documents	N/A	N/A	N/A
8	99	Per Page	Scan, Imaging, Digitization, Upload Records to Client Web-Portal	Per Pg	\$ 0.22	\$ 23.28
9	1	Flat Rate	Transportation charge, standard pickup, less than 40 miles	Round Trip	\$ 20.00	\$ 20.00

Total 128.53

EXHIBIT E
Pricing Proposal

Respondent Name

Armstrong Archives, LLC

Procurement No.:

NCT 2022-003

Item	Description	UOM	% Discount
1	Set Up New Account	Cu Ft	N/A
2	Non Climate Controlled Storage - 1 - 1,000	Cu Ft	0%
2	Non Climate Controlled Storage - 1,001-10,000	Cu Ft	12%
2	Non Climate Controlled Storage - 10,001+	Cu Ft	22%
3	Climate Controlled Storage - 1 - 1,000	Cu Ft	0%
3	Climate Controlled Storage - 1,001 - 10,000	Cu Ft	12%
3	Climate Controlled Storage - 10,001+	Cu Ft	22%
4	Add Records	Each	0%
5	Retrieval & Refile	Each	0%
6	P/U Delivery of Storage Box	Each	0%
7	Off-Site Shred	N/A	N/A
8	Scan, Imaging	Each	0%
9	Transportation Charge	Each	0%