



Request for Proposal Records Management, Classification and Destruction Services			
1. Contract No. TRDI-RP-Corp-20180824JS0000RMD	2. Award/Effective Date October 1, 2018	3. Solicitation Issue Date August 24, 2018	
4. Issued by Corey Molinelli	5. Telephone 210-572-0430	6. Email Corey.molinelli@trdi.org	
7. Offer Due Date September 26, 2018	8. Local Time 12:00 PM CST	9. Offer Must be Valid For 120 Days	
10. Contractor Name: Attention: Address: City/St/Zip: Email: Phone: Mobile:		11. Submit electronically or via Mail To: Corey Molinelli Training, Rehabilitation & Development Institute, Inc. Address: 425 Soledad St., Suite 800 City/St/Zip: San Antonio, TX 78205 Corey.molinelli@trdi.org	
12. Prime Contract #			
13. Cage Code	14. NAICS	15. Business Type: Choose an item.	
16. Accounting Data SEE SCHEDULE		17. Total Award Amount	
18a. Signature of Authorized Offer/Contractor		19a. Training, Rehabilitation & Development Institute, Inc. (Authorized Signature)	
18b. Name and Title of Signer	18c. Date Signed	19b. Name & Title of Signer	19c. Date Signed



Request for Proposal

Records Management, Classification and Destruction

Training, Rehabilitation & Development Institute, Inc. (TRDI) is seeking out qualified firms to provide Records Management, Classification and Destruction Services for our corporate staff.

Pre-proposal Conference: A voluntary pre-proposal conference will be held on **September 14, 2018** at 10:00 am CST. The conference will be held by WebEx and interested parties will be provided with information once they have R.S.V.P. Submit R.S.V.P. to Corey Molinelli at: corey.molinelli@trdi.org no later than 3:00 CST **September 7, 2018**.

TRDI contact person: Corey Molinelli Corey.molinelli@trdi.org

Evaluation Committee Voting Members:

- John M. Rangel - President
- Deyanira Serna – Vice President
- Robert Hernandez – Director of Finance
- Corey Molinelli – Safety Coordinator
- Andrea Castoreno – Accounting Clerk

Respondents must submit all questions concerning RFP to corey.molinelli@TRDI.org by 2:00 pm CST **September 21, 2018**. Please submit all question via email. Any questions submitted after deadline will not be addressed.

The cover page must be filled out by qualified firms and returned with the proposal. In compliance with this Request for Proposal and to all the terms and conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and/or items in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

The proposal is due electronically by **September 26, 2018** by 12:00 pm CST.

Event:	Date:	Time:
Issue Date:	August 24, 2018	8:00 A.M. CST
RSVP for Pre-Proposal Conf:	September 7, 2018	3:00 P.M. CST
Pre-Proposal Conf:	September 14, 2018	10:00 A.M.CST
Final Questions Due:	September 21, 2018	2:00 P.M. CST
Proposals Due:	September 26, 2018	12:00 P.M. CST
Award Date:	October 1, 2018	3:00 P.M. CST
Project Completion:	January 31 st 2019	5:00 P.M. CST



1 Purpose:

Training, Rehabilitation & Development Institute, Inc. (TRDI) is seeking from qualified firms to provide Records Management, Classification and Destruction Services for corporate staff.

2 Background:

TRDI is a 501 (c) 3 Texas nonprofit corporation providing employment opportunities to individuals with significant disabilities in the Texas, New Mexico, Georgia, Kansas, and Kentucky. TRDI is a service contractor providing services to Federal, State, and Local governments. TRDI is seeking to establish a contract for services until project completion.

3 Scope of Work

3.1 Records Management, Classification and Destruction

- a. Identify and inventory all documents / records in identified containers. The number of containers and location is listed in attachment A.
- b. Rebox all records into proper containers.
- c. Provide guidance on current Document Retention Policy for current dates of destruction.
- d. Using established retention schedules sort records into proper record series, grouping like records together.
- e. Label all containers with proper content information, including record series name, record series number, and destruction date.
- f. Identify records for permanent retention.
- g. Prepare permanent records for long term storage with proper archival storage containers.
- h. Identify and sort records that are past their retention period and obtain permission to destroy them from this office.
- i. Purge and destroy all records past their retention period in accordance with all applicable laws, regulations, standards, and practices. Providing a certificate of destruction to this office on completion.
- j. Prepare and present findings and recommendations in a written report to the Records Management Review Committee. The written report must also be provided in electronic format.

3.2 Optional Services

- a. Develop a long term storage strategy for permanent records.
- b. Develop a long term storage strategy for records that have not yet reached their retention dates.

4 Technical Proposal Format

4.1 Agents and Address

- a. List the address, email address, telephone and FAX numbers of the office from which the services are to be provided. Designate the person to serve as project manager and list the name or names of the persons in your firm authorized to negotiate the proposed contract associated with this RFP. Resumes summarizing the qualifications and experience of the individuals who will be conducting the review must be provided.



4.2 Methods and Procedures

- a. Provide a statement describing the Scope of Work as you understand it, and describe the approach, means, methods and procedures to be employed to gather the data, analyze findings and develop recommendations as requested. Provide a sample Position Description Questionnaire (PDQ).

4.3 Structure and Content of Work Product

- a. Describe the way in which the work product will be structured and presented upon completion. Include computer and software compatibility information.

4.4 Schedule

- a. Provide a timeline indicating tasks required and the start/completion dates for each milestone.

4.5 Past Performance/Project Experience

- a. All proposals should include three (3) examples of project experience: customer/contracting activity, contract performance location, period of performance, customer/contracting activity, point of contact (POC), POC addresses, POC telephone number, and POC email.

5 Cost Proposal

A cost proposal shall be submitted with a not to exceed amount for work described in the Scope of Work section. Proposals should outline for each element of the records management, classification, and destruction phases and categories of direct expenses.

6 Award Criteria

Proposals will be evaluated utilizing the following criteria to meet the performance of the services requested.

- a. Proposal completeness and compliance with specific requirements outlined in the RFP.
- b. Qualifications of the organization, the project manager and individuals performing the services.
- c. Past performance of projects similar in size and scope of services.
- d. Demonstrating an understanding of the scope of services and conveying that in the technical proposal.
- e. Cost element
- f. Schedule and time frame of services from beginning to end.
- g. Final product must be completed no later than **January 31st, 2019**

7 Submission

Proposals must be submitted to corey.molinelli@trdi.org no later than **September 26, 2018** by 12:00 PM CST. Selection of the firm will be made by **October 1, 2018** and all firms submitting proposals will be notified immediately as to the selection results. No proposal will be considered that is not received at or prior to the above time and date

8 Additional Questions

Questions regarding this proposal will be accepted via email through **September 21, 2018** at corey.molinelli@trdi.org



Attachment A:

1. Document Location Number One:

TRDI Corporate Offices
425 Soledad St. Suite 800
San Antonio TX. 78205

Inventory: 26 Long Bankers Boxes

2. Document Location Number Two:

A-AAA Key Mini Storage
6604 NW Expressway
San Antonio, TX. 78201

Inventory: 300 Mixed Size Bankers Boxes