EAST BAY MUNICIPAL UTILITY DISTRICT

REQUEST FOR PROPOSAL
for
DAM System and EBMUD Archive Scanning and Consolidation

Contact Person: Sue Leiga, Project Manger
Phone Number: 510-287-0455
Email Address: susan.leiga@ebmud.com

RESPONSE DUE

by

4:30 P.M.

on

Wednesday, May 18th, 2022

Contents

INTRODUCTION:

This notice is an invitation from the East Bay Municipal Utility District (EBMUD, The District) in Oakland, California to respond to a Request for Proposals to provide a new digital asset management (DAM) system; scan and integrate existing assets and metadata into the new DAM; and provide training and recommendations for keywording methodology.

OVERVIEW:

The District has a rich archive of photography and other visual assets, both digital and physical, that are accessed in different methods and through different systems. Approximately 10,000 digital images, with accompanying metadata, are stored in the District's legacy DAM system Cumulus, by Canto. The EBMUD archives also contain approximately 45,000 historical negatives, prints, and slides, which are tagged in and accessed through a text-only FileMaker Pro database. In addition, there is a backlog of approximately unarchived 7,500 digital photographs, which continues to grow monthly, currently stored on DVDs.

The project consists of two parts. The first is the acquisition of a DAM system that allows for the secure storage, easy retrieval, and sharing of photographs and other files. This part also includes recommendations for and creation of a taxonomy that promotes the finding of assets. The second part is the scanning and integration of historic prints, negatives, slides, and older digital files, and their metadata and narrative descriptions into the new DAM system.

The District will use these services and software to:
- Migrate the EBMUD archive of prints, negatives, and slides to the new DAM using the metadata from the FileMaker Pro database
- Migrate the existing images and metadata that are currently stored in Cumulus
- Upload the backlog of 7,500 digital images including metadata and basic tags (date, location, photographer) so that they may be keyworded and categorized by staff
- Upload, organize, add metadata to, and view new digital assets remotely from any location online
- Search for, find, filter, and retrieve digital assets from the DAM
- Provide ability for contract photographers and other third parties to upload assets including metadata and tags to the DAM system at minimum
- Manage different renditions or versions of an asset
- Share assets via email and lightboxes (including ability to comment and rate in a shared workspace)
- Control access to digital assets using role-based security
- Generate and print reports such as keywords, usage, etc.

SUBMISSION AND SELECTION:

The District intends to select the respondent or respondents who best meet the District's requirements, as listed on the following page. Respondents may bid on Part 1, Part 2, or both.

375 Eleventh Street, Oakland, CA 94607
Website: www.ebmud.com

With your proposal, provide some background on your organization and describe your core services. Also describe the base product(s) you are proposing to us as well as any extra features that may be required, along with their associated costs. To be considered, the attached PSIG security questionnaire, P-025 Contract Equity Program Summary, and Project Safety Requirements Covid-19 Vaccination and Testing form (attached) must be completed and returned with your submission.

The District expects to begin this contract immediately following Board approval of the contract. Responses to this RFP should be submitted by email to susan.leiga@ebmud.com no later than 4:30 pm on Wednesday, May 18th, 2022.

Any questions regarding this proposal should be referred to Sue Leiga at 510-287-0455 or susan.leiga@ebmud.com.

REQUIREMENTS:

The District seeks to satisfy as many of the following requirements as possible.

PART 1: DIGITAL ASSET MANAGEMENT SYSTEM

Cost
- Describe your pricing model; the District has 2,000 employees, all of whom would have access to the system. Approximately 15 would be power users (uploading, file retrieval, sharing and administration). In addition, we expect approximately 24 professional photographers plus employees to need access to upload files.

Security
- System transfers data over an encrypted connection
- System stores EBMUD data in an encrypted format
- If the system does not support SSO, it must support strong password policies and two-factor authentication
- System supports role-based access to features
- System supports single sign-on (SSO) - Integration with Azure and OneDrive/SharePoint
- Describe your integration methodology with Azure and OneDrive/SharePoint

Technical
- Describe your change management strategy for system updates, patches and maintenance
- Describe your strategy for system outages during business hours
- Describe your approach to handling situations where changes cause integrations to break (whether or not such changes are vendor-made)
- SaaS software solutions should be fully supported and maintained by the vendor. District staff should be able to fully access the system using only standard web browsers. The District should not need to install, host, or provide any solution elements except for SSO, Azure, OneDrive, and SharePoint integration.
- The vendor must handle all extraction and transformation of images and metadata from source systems to the DAM system

- At a minimum, at least two environments are required: production and development

High-Level Requirements
- Supports all digital multimedia file types: JPEG, TIFF, PNG, video, PDF, DNG, Illustrator, etc.
- Ability to store digital assets of any size
- System supports limitless storage
- System supports multiple, redundant automatic back-ups to prevent data loss
- Ability to protect original files from deletion, overwriting, or unauthorized use
- Ability to read, import and export EXIF image metadata

Uploading and Tagging
- Describe your download and upload times for digital assets of various sizes (10 MB, 100 MB, 500 MB, 1 GB, etc.)
- Ability to customize limitless tag categories and values, such as locations or photographers
- Ability to tag individual images or groups of assets, simultaneously
- Ability to select one or more tag values from a predetermined list of acceptable values
- Ability to type a few letters when tagging and select a value from a list of matching values
- Ability to require fields when tagging assets
- Ability to upload and add metadata from outside the District network, from any standards-compliant web browser
- Ability to make mass updates to tags or permissions to view or download. For example, bulk edit a tag from one term to another if there is an error or change, or when staff members separate and we can no longer use images of them we could reflect this change.

Viewing and Downloading
- Ability to find digital assets with a choice of file sizes, resolutions, versions (horizontal, vertical, cropped, etc.), and types (video, PDF, JPEG, TIFF, etc.)
- Ability to find and download single assets or groups of assets
- Ability to flag, rate, and sort digital assets
- Ability to view images with certain tags and filter them further by other tags (faceted search)
- Ability to view groups of assets at different sizes (large enough to see detail, but still loading quickly)
- Ability to see which assets have been flagged as outdated or otherwise obsolete
- Ability to record and view where assets have been published
- Ability to access assets from a mobile phone or tablet or from any standards-compliant web browser
- Ability to save and track the history of previous changes to assets

License and Rights Management
- Ability to control access by group (full access, limited subset, viewing, uploading, tagging, downloading, etc.)
- Ability to include copyright/use restrictions in asset metadata (in what manner we can use the image, number of times we can use the asset, the company the image was purchased from, data purchased, etc.)
- Ability to record and view third parties who have been given permission to use an image (e.g., a newsgroup)
- Ability to see download history by asset or by user

- Ability to limit viewing and downloading of assets, based on copyright restrictions
- Ability to limit viewing and downloading of assets, based on group permissions
- Ability to provide all District staff read-only access by default
- Describe how new employees are entered into, and granted access to, the system
- Describe how non-District employees' access and security is managed
- Describe the license structure and pricing

Reporting and Exports
- Describe your reporting infrastructure and functionality around reporting
- Provide a list of standard delivered reports along with examples of these reports
- Ability to create custom reports that use various filters
- Ability to generate reports based on asset uploads, searches, views, downloads, and usage frequency by age of the assets
- Ability to export reports for analysis in third party applications
- Ability to export metadata and keyword lists
- Describe how to export all files and metadata out of the DAM system and into a database and/or file system controlled by the District. For example, we may need this functionality when we no longer use the software.

Sharing and Collaborating
- Ability to share any versions or resolutions of assets internally or externally
- Ability to choose and share any image in various resolutions (low, medium, high for example).
- Ability to identify and share selected assets
- Ability to rank and 'favorite' images for comparison
- Ability to create and share lightboxes
- Ability to share links to individual assets and groups of assets via email and within the DAM system
- Ability for staff to comment on assets in the system and in lightboxes
- Ability to be notified of comments added to assets that have been shared with others

Version Control
- Ability to relate versions of a file to original (e.g., original, low resolution, high resolution, cropped, altered, horizonal, vertical, etc.)
- Ability to view an asset and find the most recent revision of the asset

Workflow
- Ability to request permission to publish or use an asset
- Ability to approve requests to publish or use an asset
- Ability to be notified of asset approval requests and approvals

Content Standards
- Provide assistance on a taxonomy, including how to best use naming conventions, tags, and tag categories to optimize the finding of assets in the selected DAM system
- Provide best practice recommendations for creation of new keyword categories including how many categories to create, common categories used in DAM systems, etc.
- Provide recommendations for required and optional sets of keywords

- Provide feedback and suggestions for improvement on our existing keyword naming conventions and categories

Training and Support
- Train District staff to find and access assets quickly
- Train District staff how to upload and add keywords to assets both on premises and remotely
- Provide train-the-trainer materials for the District to use in training of new employees and contractors
- Provide your service level agreement (SLA) for supporting the DAM system
- Provide email and phone support for the DAM system for the life of the subscription
- Provide point of contact or client manager to assist with troubleshooting during local business hours (8 AM – 5 PM), at a minimum

PART 2: SCANNING AND INTEGRATION OF EXISTING PHYSICAL ASSETS, DIGITAL ASSETS AND METADATA

EBMUD Archive of Non-Digital Images
- Scan approximately 17,000 prints and negatives from the EBMUD archives and import them into the DAM system
- Scan approximately 28,000 existing slides from the EBMUD Archive (in a variety of sizes from 35mm to 5" x 7" format or larger) and import them into the DAM system
- Import images and existing associated FileMaker Pro descriptions, image names, image numbers, and all details into the DAM system to link each file to its unique descriptors and data.
- Please describe the plan to extract 45,000 images plus metadata out of FileMaker Pro and into the new DAM system, linking each file to its unique descriptors and data. See Appendix D for more information.
- Ability to find images using existing FileMaker Pro metadata, file names, and narrative descriptions
- Ability to carefully handle and scan historic prints, negatives (including a few glass negatives) and slides
- Ability to deliver sample scans for approval intermittently throughout the scanning process (before starting scanning for each image type, and at intervals of 25%, 50% and 75% completion) for each type of image (e.g., glass negatives, prints, slides)
- Ability to scan prints, slides and negatives to the maximum color and spatial detail contained in the source images
- Ability to scan prints, negatives and slides that may be degraded, to best access the loss in color, detail, etc.
- Vendor may recommend batch color corrections and adjustments.
- Please provide line-item costs to clean and remove dust from slides and negatives
- Please provide line-item costs to return scanned images in new plastic sleeves versus throwing the images away
- Describe how you would facilitate the scanning of these documents. Note that some documents are historic, old, and fragile.

EBMUD Archive of Digital Images
- Ability to import 10,000+ digital images, with accompanying metadata, currently stored in the DAM system Cumulus, by Canto

- Ability to upload 7,500 backlogged digital images with basic data (date, location, photographer) for further tagging/keyworking by staff. Ability to find digital images using existing descriptions and metadata from Cumulus
- Please describe the plan to extract 10,000 images plus metadata out of Cumulus and into the new system, linking each file to its unique descriptors and data. See Appendix D for more information.

RFP REVIEW CRITERIA:

A. **Technical Criteria:** In each described area below, an evaluation will be made of the probability of success of, and risks associated with, the RFP response:

   a. **System Design –** A comparison will be made of the vendor platforms. This evaluation will include technical architecture, data security, and integration with District systems.
   b. **Services –** A comparison will be made of the proposed services with the requirements of this RFP. Credit will be given for convenience, responsiveness, and technical expertise.
   c. **Accessibility –** Describe how the DAM system resources can be accessed and provide information on technical requirements to gain access or special hardware or equipment necessary for access. Additional credit will be given for features of the proposed system that offers enhanced utility, ease of use, and integration with single sign-on, as well as equipment and systems.
   d. **Migration –** describe how existing archive data from each file type and associated descriptors will be integrated into new system, and how searchability/retrieval will be successful.

B. **Cost:**
   a. For Part I, please itemize and include all costs involved with the initial set-up of the DAM, including transitioning existing digital files and their data to a new system, training, IT requirements; hardware; recurring costs of software; additional storage; additional users; site security and back up; maintenance, anticipated future costs and considerations to ensure software is up to date; system support. Also include time spent, any time that District staff are expected to contribute, and any additional costs that would aid in project success.
   b. For Part II, provide line-item costs for scanning existing archives in each format and quantity. Include scanning method, resolution. Describe specific costs to integrate existing files once scanned, and their descriptors, to ensure accurate retrieval as well as quality of scans of the assets themselves.

An evaluation will be made of: (1) reasonableness (e.g., does the proposed pricing accurately reflect the Proposer's efforts to meet requirements and objectives?), (2) Realism (e.g., is the proposed cost appropriate to the nature of the products and services to be provided?), and (3) Affordability. Consideration of price in terms of overall affordability may be controlling in circumstances where two or more RFP responses are otherwise judged to be equal, or when a superior RFP response is at a price that the District cannot afford.

C. **Implementation Plan and Schedule:** An evaluation will be made of the Proposer's implementation plan and schedule for how well they align with EBMUD's needs. Additional credit will be given for the identification and planning for mitigation of schedule risks.

D. **Methodology: RFP responses will be evaluated against the RFP specifications and questions below:**
   a. Does the methodology depict a logical approach to fulfilling the requirements of the RFP?
   b. Does the methodology contribute to achieving the objectives set out in the RFP?
   c. Does the methodology interface with the District's time schedule?

E. **Completeness of proposal in meeting all requirements**

F. **Relevant Experience: RFP responses will be evaluated against the RFP specifications and the questions below:**
   a. Does the vendor have relevant and quality experience providing DAM systems or scanning/archiving historical photo assets that meet criteria above?
   b. Does the vendor provide references of organizations where they provided similar services?
   c. How long has the vendor been in business?
   d. Has the vendor grown what is offered by the software to meet modern business needs, including collaboration, permissions, security and user interface design and navigation?

G. **References:** Please submit at least three references.

H. **Contract Equity Program:** Consideration will be given for compliance with Contract Equity Program, including local business status, small business status, and diversity of team members/subconsultants.

SCOPE:

EBMUD intends to award a contract of up to five years for a DAM system.

EXHIBIT A

Preliminary Security Information Gathering (PSIG)

EXHIBIT B

Employment Data and Certification Instructions (P-025)

EXHIBIT C

Project Safety Requirements Covid-19 Vaccination and Testing

EXHIBIT D

Samples of FileMaker Pro and Cumulus Metadata