

REQUEST FOR QUOTE (RFQ)
"Scanning and Maintenance Software Services"
RFQ# "2027-001"

A. Scope:

This solicitation is to solicit proposals from capable and experienced vendors ("Respondents") to provide the Goods and Services as outlined below.

The Board of Education Retirement System seeks a vendor to provide "Scanning and Maintenance Software Services" for a period of one (1) year. BERS reserves the unilateral option to extend the term of the contract for three (3) additional one-year periods; term to be determined upon award.

Vendors must submit a description of the product along with pricing; incomplete submissions will be disqualified.

Proposals will be reviewed and considered as received. Vendor selection will be made upon receipt of an acceptable proposal that meets the requirements outlined in the solicitation and provides the best value to BERS. The Best Value will be determined based on the following criteria:

1. Technical requirements and functionalities, including, but not limited to, integration approach.
2. Support services, including hours of support, response times, security, maintenance, and training offerings.
3. Pricing, including license fees, implementation costs, annual maintenance and support services.

Best Value ensures that BERS receives the required goods and services at competitive pricing, taking into account the necessary requirements and cost factors to determine best value.

For all questions related to this solicitation, please send an e-mail to BERSProcurement@bers.nyc.gov with the solicitation's number and title in the subject line of your e-mail.

If you are not going to bid on the RFQ please respond with your reason not to bid.

RFQ Timeline:

- RFQ Release Date: **July 28, 2026**
- Deadline for vendors to submit written inquiries via email: **No later than 4:00 P.M. ET on August 4, 2026**
- Posting of Questions and Answers ("Q&A") document: **On or about August 11, 2026**
- **Responses Submission Due Date: No later than 4:00 P.M. ET on August 18, 2026**

B. List of Requirements and Preferred Features:

#	Service	Description
1	High-Volume Digitization & Image Capture	Requirements: 1. Provide software that is compatible with Kodak scanners or other comparable devices, as required by BERS, to scan documents, produce multiple file formats, including, but not limited to, PDF files and generate meta-data files for PDF files. Meta-data files must conform to a specified format. 2. Must be able to scan multiple file formats, including, but not limited to, PDF files. 3. Must recognize bar code and translate into a specific document type ID, based on BERS specific document code designation.
2	Process Automation	Requirements: 1. The software must support the following Workflow: a. Scan → Index → Verify 2. The software must enforce two different operators to perform the workflow. One staff to scan and index documents and another staff verifies the indexed information before PDF files and meta-data files are generated. Preferred Features: 1. Trainable to recognize different document content. 2. The software should allow the flexibility to include a BERS receipt and a date and time stamp to certain documents after scanning.
3	Security and Access	Requirements: 1. Control access to the scanning software using Microsoft Active Directory group. BERS has a service account for Active Directory access. 2. Window client that requires software installation on the windows machine. 3. Files must be protected using appropriate security controls at the Comprehensive Pension Management System (CPMS) stage. Preferred Features: 1. Web client that uses a web browser with a specific URL to replace the Window client. 2. Optional servers hosting service if a server is required.
4	Data Integration	Requirements: 1. Communicate with Vitech V10 in REST API to retrieve members' information. Preferred Features: 1. Interface with Vitech V10 import API skipping meta-data files generation.
5	Quality Control	Requirements: 1. Must be able to provide audit trail functionality. Including, but

		not limited to, capturing and logging the date and time of scanning, user activity, and retaining the original scanned document. 2. Software must be able to generate reports of each scan by user, date, and time.
6	Maintenance and Software Assurance	Requirements: 1. Maintain software up-to-date to ensure efficient workflow, including security updates.
7	Software Customization	Requirement: 1. Describe in detail if any customization would be required to fulfill the scope and include work hours and cost.
8	Storage Service	Requirement: 1. Documents must not be stored on the vendor's cloud. All storage must be managed on an on-premises local server. 2. Provide details of retention policies, including retention periods, storage practices, and disposal procedures. Preferred Features: 1. Transfer all processed files to BERS' designated online storage platform/ Box.com.
9	Server Hosting	Requirements: 1. Indicate whether files will be stored in the Cloud or on-premises. 2. Indicate whether on-premises servers are required. Preferred Features: 1. Provide details on how the system will integrate with existing scanners, including compatibility requirements and needed infrastructure.
10	Demonstration (Optional)	Requirement: 1. Vendors may be required, at BERS' discretion, to provide a live demonstration of their proposed solution to showcase functionality and capabilities.
11	Artificial Intelligence (Optional)	Preferred Features: 1. AI features to recognize document types even without barcode, Correspondence In, Correspondence Out, Power of Attorney (POA), legal documents, forms, etc., and automatically index documents based on document type. 2. AI features to recognize members' ID number, names, addresses, phone numbers, etc.

C. Pricing Requirements:

The Pricing Proposal (Budget) must reflect all unit prices/fees, the extended total cost, and description of each line-item deliverable/service on the attached excel template. Unit prices/fees must include all the costs associated with the goods and/or services for which the vendor will invoice on a per-use, monthly, quarterly or annual basis. The awarded vendor will not be able to invoice for items not included in the approved Pricing Proposal (Budget). Respondents may include additional pricing information, or budget narrative, if necessary, to clarify their pricing structure.

Unit prices/fees are maximum, not-to-exceed amounts that will be incorporated into the agreement. Unit prices/fees proposed (or any component thereof) are not subject to upward adjustment.

D. RFQ Terms and Conditions:

1. In responding to this RFQ, the Vendor acknowledges and accepts the Board of Education Retirement System's (BERS) Terms & Conditions located at <https://www.bers.nyc.gov/site/bers/notices/solicitations.page>. Additionally, the vendor acknowledges and accepts the NYC Office of Technology and Innovation Department ("OTI") Security Requirements for Vendors & Contractors located at: <https://www.nyc.gov/content/oti/pages/vendor-resources/cybersecurity-requirements-for-vendors-contractors>.
2. Vendor may attach a quotation to this form or may enter prices directly on the attached excel template. If a separate quotation is provided, the Vendor Information Section of the excel template must be completed and attached as the first page of the Vendor's proposal.
3. This RFQ is not a commitment to purchase. Only a purchase order issued by BERS to the awarded vendor in response to this RFQ constitutes such a commitment.
4. BERS reserves the right to order the quantity that it requires.
5. The Tax Law exempts New York State governmental entities, such as the Board of Education Retirement System of the City of New York (BERS), from the payment of New York State and local sales and use taxes on their purchases.
6. In the event of a discrepancy/error in the Total Price(s) indicated above or in the Vendor's quotation, the Unit Price will prevail.
7. Terms of payment shall be **Net 30 days** from the receipt of Vendor's invoice by BERS. All invoices must be sent to BERS_Accounting@bers.nyc.gov.
8. Vendor's proposal shall be valid for **sixty (60) calendar days** from the date of Vendor's proposal submission.
9. Award will be made to the most responsive and responsible Vendor whose proposal is determined to provide the best value to BERS, as defined by the requirements outlined in this solicitation. BERS reserves the right to request the Vendor(s) to demonstrate that adequate skills, equipment, and resources are available for performance of the required services and/or delivery of goods.
10. BERS reserves the right to request any additional information that it deems necessary in order to make a decision on any proposal.
11. BERS reserves the right to reject any or all proposals after evaluation. Rejection of all proposals will mean that BERS, in its own best interest at the time, has determined not to pursue the acquisition.
12. Any quote proposal not supported by the information requested in the RFQ, or not complying with the RFQ requirements, may not be considered.