



Dutchess County Workforce Development Board

3 Neptune Road Poughkeepsie, NY 12601 Telephone (845) 463-0517 Fax (845) 463-0100 www.dcwib.org

“Driving economic growth through Workforce Partnerships”



REQUEST FOR PROPOSALS (RFP)

Organizational File System Assessment & Restructuring Services

Dutchess County Workforce Investment Board (DCWIB)

I. RFP SUMMARY

Issue Date: Monday, March 20, 2026

Proposal Submission Deadline: Thursday, April 20, 2026 (Close of Business)

Anticipated Award Date: Thursday, April 30, 2026

Project Period: An agreed-upon timeframe between May 2026 and December 2026

Estimated Budget Range: \$2,500 – \$5,000

Contact for Submission and Questions:

Dutchess County Workforce Investment Board

3 Neptune Avenue

Poughkeepsie, NY 12601

Email: admin@dcwib.org

Phone: (845) 463-0517

II. BACKGROUND & PURPOSE

The Dutchess County Workforce Investment Board (DCWIB) administers workforce development programs funded through federal and state sources, including the Workforce Innovation and Opportunity Act (WIOA).

DCWIB currently maintains files across approximately five to six shared drives and digital storage environments, resulting in inconsistent structures, duplicate files, version control challenges, and inefficiencies.

The purpose of this RFP is to engage a qualified consultant to assess, reorganize, and implement a streamlined, compliant, and sustainable digital file management structure.

III. SCOPE OF SERVICES

1. Assessment

- Inventory existing drives and storage systems
- Evaluate redundancies and inconsistencies
- Review user access permissions
- Conduct brief staff input discussions
- Provide written findings summary

2. System Design

- Develop a unified folder taxonomy aligned with DCWIB operations
- Establish naming conventions
- Recommend version control standards
- Develop archive and retention structure consistent with federal and state requirements

3. Implementation

- Consolidate and reorganize files
- Remove duplicates where appropriate
- Apply standardized structure
- Configure permissions
- Ensure minimal disruption to operations

4. Documentation & Training

- Develop a File Governance Guide
- Provide written procedures
- Conduct at least one staff training session
- Provide limited transition support

IV. DELIVERABLES

- Assessment summary
- Approved folder structure
- Naming convention guide
- Governance documentation
- Completed file reorganization
- Staff training materials
- Final project summary

V. VENDOR QUALIFICATIONS

- Experience with digital file organization or document management
- Experience serving public or nonprofit organizations preferred
- Familiarity with compliance-driven environments
- Experience with Microsoft 365, SharePoint, or network drives
- Ability to provide training and written documentation

VI. PROPOSAL REQUIREMENTS

Proposals must include:

- Organizational overview and relevant experience
- Description of proposed approach
- Proposed timeline
- Hourly rate(s)
- Estimated total project hours
- Not-to-Exceed (NTE) total project amount
- Three professional references

Proposals must be received by Thursday, April 9, 2026 (COB).

VII. PRICING & PAYMENT TERMS

Compensation will be based on actual time spent, supported by itemized invoices.

Respondents must provide hourly rate(s), estimated total project hours, and a firm Not-to-Exceed (NTE) amount within the estimated budget range of \$2,500 – \$5,000.

Invoices must include dates services were provided, description of services performed, hours worked, and applicable rate.

Payment shall not exceed the approved NTE amount without prior written authorization.

VIII. WIOA COMPLIANCE & FEDERAL REQUIREMENTS

This project may be supported in whole or in part with funds authorized under WIOA. The selected contractor must comply with WIOA, 2 CFR Part 200, applicable New York State regulations, and equal opportunity provisions under WIOA Section 188.

All costs billed must be allowable, reasonable, necessary, and adequately documented.

IX. NON-DISCRIMINATION

In accordance with WIOA Section 188, DCWIB and its contractors shall not discriminate on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, citizenship, or participation in a WIOA-funded program.

X. EVALUATION CRITERIA (100 Points Total)

- Understanding of Scope & Organizational Needs – 20 points
- Technical Approach & Methodology – 20 points
- Relevant Experience – 20 points
- Qualifications & References – 15 points
- Cost Reasonableness – 15 points
- Timeline & Feasibility – 10 points

ATTACHMENT A – Federal Contract Provisions & Assurances

The selected contractor agrees to comply with WIOA, 2 CFR Part 200, and all applicable federal, state, and local laws.

All costs must be necessary, reasonable, allocable, and documented.

Records must be retained for a minimum of three (3) years following final payment.

Contractor shall cooperate with monitoring or audit activities.

Contractor certifies it is not debarred or suspended from participation in federally funded programs.

DCWIB may terminate the contract for cause or convenience.