



Request for Quotes (RFQ) for Records Management Consultant Services

Village of Perry
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Request For Quotes for Records Management Consultant Services

Village of Perry, New York
March 11, 2026

Overview

The Village of Perry is centrally located in Wyoming County and is within 3 miles of the Perry Entrance to Letchworth State Park and 1 mile from Silver Lake. It is about a 30-minute drive South of the NYS Thruway at Batavia (Rt. 246), between Rochester & Buffalo and adjacent to the Finger Lakes region.

The Village Clerk's Office has the responsibility of maintaining all important records for the Village. Previously, the Village did not keep an inventory or accurate records for any department within the Village. Records are stored throughout the building and have not been effectively managed. The records need to be organized, indexed, and relocated. The Village needs to have a comprehensive inventory performed of all records, in addition to Perry's active records, in order to bring all files (active and inactive) into compliance with standards expressed in NYS Archives Records Retention and Disposition (hereinafter referred to as "LGS-1"). Proper records management indexing policies and procedures need to be established.

The Village is requesting quotes for Records Management Consultant Services for a project proposed for the State Archives Local Government Records Management Improvement Fund (LGRMIF) grant program under the Inactive Records category for Inventory and Planning to:

- inventory active and inactive paper and electronic records,
- identify and prepare for destruction of obsolete records,
- re-house and organize remaining records with labels including destruction dates,
- prepare a needs assessment and records management plan, and
- make recommendations for new policies and procedures for the storage and management of records.

Consultant Quote Due Date and Time: Friday, March 27, 2026 by 5:00pm

Responses and questions about this RFQ should be sent by email to: Christina Slusser, Village Clerk, cslusser@villageofperry.ny.gov

Project Scope and Objectives

1. Inventory, Review & Identification of Active and Inactive Paper Records

- a) Review the Village's active and inactive paper record collection currently stored in the Village Hall in our active records area as well as additional records stored throughout the building. See attached paper inventory.
- b) Accurately identify relevant records to be moved to the Village records storage area.
- c) Determine required retention period for inventoried records per Schedule LGS-1.
- d) Box retained records into standard 1 cubic foot records storage boxes. (Boxes will need to be provided by the contractor.)
- e) Prepare a records inventory listing/floor plan that includes the following information:
 - Container locations/layout (ex. Room, shelf, cabinet)
 - Unique container identification number (ex. by department)
 - Department-specific/type of record (ex. map vs. file)
 - General description of the box contents
 - Record series title & number
 - Retention period
 - Date record is eligible for destruction
- f) Print box identification sheets and place them into plastic sleeves adhered to boxes. (Sleeves or labels will need to be provided by the contractor.)
- g) Sort the inventory list per the following criteria:
 - Records available for disposal
 - Permanent records
 - Records to be retained following the LGS-1 schedule
 - Records needing further identification by Village personnel to determine disposition
 - Records eligible for destruction

2. Development of a Records Management Plan, Policies, and Procedures Designed to Ensure the Security, Retention, and Appropriate Disposition of all Records for which the Village is responsible.

- a) Provide an assessment of the Village's overall records management environment, including:
 - Identification of areas in need of improvement
 - Prioritization of areas of focus
- b) Create a Records Management Plan to guide the Village in building its records management foundation for next 3-5 years
- c) Recommend policies and procedures to be established by the Village to use from this point forward

3. Destruction of All Eligible Records.

Vendor Experience and Qualifications

Your response should include:

- A statement of your qualifications and experience in records management, particularly focusing on similar projects for local government agencies or large municipalities.
- An overview of previous projects, including details of scope, tasks performed, and outcomes achieved, specifically those related to paper and electronic records management.
- Demonstrated expertise in working with municipalities to develop and implement effective records management plans and systems.
- Relevant references

Site Visit (optional): If you would like to schedule a time to visit to review the current records situation, please contact Christina Slusser to set up a time to visit.

Project timeline

Timeline: The consultant will be expected to complete the project between July 1, 2026 and June 30, 2027.

Vendor Instructions

Quotations should provide an itemized cost for services based on the total volume of records for the inventory, to prepare a needs assessment and records management plan, and provide training.

Deadline for Quotes:

Responses to this RFQ must be submitted by email to Christina Slusser at cslusser@villageofperry.ny.gov no later than 5:00pm on Friday, March 27, 2026.

The Village of Perry reserves the right to reject any and all quotes received in response to this RFQ.

Paper Records Inventory

Series Title	Est. Volume CF	Description of item in schedule category
General	81	Meeting minutes
		Legal agreements
		Proof of publication
		Procedures
		Misc Correspondence
		Accident reports/property damage
		Official copy of publication
		Special project or program files
		Village Election
		Letchworth Cable Access
		Training records
		FOIL
		Repair, installation, maintenance or similar record
Grants	37	Grant applications
		Supporting Documents/Plans
Archives/Clerk Files	52	Archival administration records
		Misc Clerk Files
Legal/Court	138	Legal case file
		Court records
Police	42	Misc Police records
Fire	14	Misc Fire Dept records
Building and Property Regulation/ Zoning	52	List, reports, studies, queries, searches for information, special project records and analyses
		Zoning permits/Applications
		Building condemnation and demolition files
Community Development	10	Resiliency study case files
		Federal assistance application
		Letchworth Gateway Villages
		Center Street study
Environmental Facilities/General	7	Capital construction or public improvement project file for environment facility (including maps, plans, as built, designs, sketches, architectural drawings etc.)
		Permit or registration files for construction, operation and maintenance
		Clean energy studies
		Tree board Environmental facility alarm, problem and emergency records

Series Title	Est. Volume CF	Description of item in schedule category
	25	Permits and approvals Reports and studies Silver Lake Watershed documents Water systems periodic operation reports Water supply emergency response plan
Environmental Facilities/ WWTP	15	Permits and approvals Records relating to a receipt and pretreatment of significant industrial or other high-discharge waste Reports and studies Records relating to sludge, biosolids, unprocessable solids or other waste byproduct
Administrator	6	Executive, Manager or Administrator's office files
Fiscal (Budget/AUD/ Taxes)	117	Report of audit of financial affairs Audit background documentation Banking communications Tax rolls & receipts Copy of check or check stub Bank deposit books Bonds/BANs Debt service Annual budget / Budget prep

Series Title	Est. Volume CF	Description of item in schedule category
General Accounting & Miscellaneous	59	General ledger
		Accounting register
		Cash transaction record
		Notice of encumbrance
		Receipts
		Billing records
		Tax exemption records
		Credit card records
Payroll	28	Payroll records & reports
		Timecards/Timesheets
		Time off requests
		Payroll deduction forms
		Quarterly reports - 941 & NYS-45
		W2s and 1099
Purchasing	75	Purchase orders
		Vouchers
		Invoices
		Abstract of payments

Series Title	Est. Volume CF	Description of item in schedule category
Reports	86	Daily, weekly, monthly, quarterly, or other periodic fiscal reports
		Water consumption
		Water and sewer reports
		Payments stubs
Insurance	6	Insurance
		Workers' compensation records
		Insurance policy
		Liability insurance policy
		Certificate of Insurance
		Fire insurance
Personnel/Civil Service	23	Personnel records
		Investigative records and disciplinary proceedings
		Employees training history records
		Public employee grievance records
		Oath of office
		Employee injury record
		Employee medical records
		Employment Eligibility Verification form I-9
		General retirement
		Documentation of other violations of alcohol or substance abuse rules
		Employee attestation of knowledge of code of ethics, staff policy manual or other official policies and procedures
Public Property and Equipment	12	Real property acquisition or sale file
		Copy of sale, auction, or advertisement of sale of real property
		Capital construction or public improvement project file
		Official plans, maps, designs, architectural drawings, photographs
		Real property deeds
Total	885	