

Boone County Purchasing

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NOTICE OF AWARD MEMORANDUM

TO: Melinda Bobbitt, Director and File
FROM: Liz Palazzolo, CPPO, C.P.M.
DATE: December 20, 2023
RE: Award Contract C000707 from RFP 27-19JUN23 for Off-Site Scanning Services for the Resource Management Department

Request for Proposal competitively bid Off-Site Scanning Services for the Boone County Resource Management Department. A total of five responses were received:

1. Canon Solutions America of Melville, New York
2. Global Business Solutions of Oak Park, Michigan
3. IMS Technology Solutions of Mexico., Missouri
4. Sutterfield Technologies, Inc. of Duncan, Oklahoma
5. US Imaging, Inc. of Saginaw Michigan

Proposals have been evaluated by an Evaluation Committee consisting of Bill Florea, Director of the Resource Management Department; Kelle Westcott, Budget Administrator for the Resource Management Department; Paula Evans, Administrative Coordinator of the Resource Management Department; and Thaddeus Yonke, Senior Planner of the Resource Management Department.

Several evaluation meetings were conducted and chaired by the Purchasing Department. Four Best and Final Offer Requests were issued. All five vendors were requested to submit a response to Best and Final Offer (BAFO) #1.

As a result of this first round of BAFO requests, the proposal from Canon Solutions America was removed from further consideration. The proposal from Canon Solutions America contained a Master Service Agreement that contained several terms that were unacceptable to the County. The County requested that the Master Service Agreement be removed from the proposal in Best and Final Offer Request #1. Canon Solutions America declined to remove their Master Services Agreement. Refusing to allow the RFP terms to govern a prospective Purchase Agreement made the proposal from Canon Solutions America unacceptable.

The proposal from Global Business Solutions was removed from further consideration as a result of their Best and Final Offer #2 response. The proposal from Global Solutions Group was ultimately deemed unacceptable after repeated efforts the County employed to get the vendor to provide more detail about its proposed work. Global Solutions Group was asked in both Best and Final Offer Requests #1 and #2 to provide detail relevant to the Evaluation Team that would allow the evaluators to assess whether or not Global Solutions Group had an accurate sense of the volume of scanning and microfilming work the County required. It is noted that Global Solutions Group did not do a site visit prior to submitting their proposal to gauge the number of documents the County had for scanning and ultimately for microfilming. In BAFO #2, Global Solutions Group failed to provide a total estimate for microfilming, stating that the estimate was “Not Available as Exact Volume unknown.” Global Solutions Group indicated “NA” for details about the time anticipated to conduct and finish microfilming work. In their Best and Final Offer #1 response, Global Solutions Group, Inc. stated “Unknown Services: If we come across any situation that has not been identified in RFP or Addendums, then we will reach out to the customer and identify a mutually agreed solution and associated cost.” The initial offer contained similar disclaimers. As such, the Evaluation Team decided not to pursue this proposal further, declaring it unacceptable and incapable of final scoring.

The Evaluation Committee completed the subjective evaluation of the remaining three proposals using this criteria and weighting: Experience, Expertise and Reliability of the Offeror, maximum 10 points; and Proposed Method of Performance and Contractor Support, maximum 40 points. The Evaluation Committee’s evaluation report follows this memo. It is noted for the record that subjective scores were awarded without knowledge of the offeror’s cost points.

The Purchasing Department conducted the cost evaluation which is documented in spreadsheets that follow this memo. The pricing for the original contract period and the four renewal options was considered in order to compute the total maximum liability for the County since the contract may run for a total of five years. The cost evaluation used quoted unit pricing multiplied by estimated totals for each unit price for the initial period which were higher than for the renewal periods because the bulk of work will occur in the initial contract period. There are clearly identified columns in the cost evaluation showing the quantity for the initial year and the quantity for each renewal year. The Resource Management Department helped to develop the unit estimates used in the cost evaluation.

In order to have an “apple-to-apple” cost analysis, the offerors’ transportation costs were included. In the case of IMS Technology Group, an additional total was included in their overall cost total because IMS indicated in BAFO its #3 response that there would be an add-on charge if they prepared the files for transport. Since both US Imaging and Sutterfield Technologies included this in their pricing, this additional cost was added to IMS’s total. The computation of this total is documented in the cost evaluation. Also, as a result of the US Imaging BAFO #3 response, since their indexing pricing was quoted per pass, and since they have to “double pass” to ensure required 100% accuracy, their

price of \$.80 for indexing was doubled to \$1.60 for the cost evaluation. This is noted in their cost evaluation spreadsheet.

Cost points are based on the total overall price computed for each offeror using this formula: $\text{Lowest Total Cost} \div \text{Competitor's Total Cost}$. This result is multiplied by the maximum number of cost points, 50, to determine the share of cost points awarded to each offeror.

The following table shows all point scores

Offeror	Experience, Expertise and Reliability of Offeror Points (10 Maximum)	Proposed Method of Performance and Contractor Support Points (40 Maximum)	Cost Points (50 Maximum)	Total Evaluation Points (100 Maximum)
US Imaging	4	40	34	78
Sutterfield Technologies	9	18	28	55
IMS Technology Group	3	13	50	66

US Imaging's total evaluation points are the highest and therefore represents the "lowest and best" proposal. An award of contract has been recommended by The Evaluation Committee for Off-Site Scanning to be made to US Imaging of Saginaw, Michigan.

Payment will reference 1710 – General Fund Resource Management
Land Use Planning/71100 – Outsourced Services: Term and Supply. It is noted that \$125,000.00 is budgeted, but actual costs will be determined by the number of images and hours actually dedicated to perform the work.

/lp

Evaluation Report for Request for Qualifications

27-19JUN23 – Off-Site Scanning Services for Resource Management

OFFEROR #1: US Imaging

 X It has been determined that **US Imaging** has submitted a **responsive** Statement of Qualifications meeting the requirements set forth in the original Request for Qualifications.

 It has been determined that **US Imaging** has submitted a **non-responsive** Statement of Qualifications.

Strengths:

Experience, Expertise and Reliability of Offeror: Score 4 of 10

- In business since 1976 but began scanning microfilm & paper in 1993 with Michigan location performing all microfilm scanning from 1996-2006 with scanning & indexing for over 100 counties;
- Since 2006 Michigan location changed to US Imaging, Inc and has since performed paper, book and microfilm scanning exclusively for counties. In the past 17 years they have served 874-974 Counties, with 41 of them being in the State of Missouri;
- References are County entities, and one is for Community Development, so their projects are assumed to be similar to the Resource Management project;
- The US Imaging team consists of experienced staff who were named, and their background described in the proposal. This is a full team of staff experienced in scanning and imaging work for entities like Boone County who will be assigned to the Boone County project;
- Team member – County's identified point of contact is Mark Lystiuk who is listed as having experience working in the Land Records Management Software areas and with other counties managing scanning their land records sector plats, surveys, etc, which is similar to the County's project;
- Experience with microfilming - US Imaging references that it has more than 200 active conversion projects that involve microfilm and other media sources;
- Performed site visit (6/1/2023) prior to submitting proposal – offers degree of reliability having seen the project work;
- US Imaging recognizes its lack of experience formatting for RVI but cites formatting images for over 50 Records Management Systems and has a programmer on staff to conduct the formatting.

Concerns:

- No previous formatting experience with RVI

- US Imaging failed to answer 2 questions in its BAFO #3 response, prompting additional request from County for clarity.
- From reference checks, neither Henry County nor Clinton County had microfilming done as part of their contracts with US Imaging;
- From reference checks, neither Henry County nor Clinton County had experience with US Imaging interfacing with either entity's imaging system;
- From reference checks, Henry County has no plats that US Imaging scanned or other large documents; Clinton Co did and had no issues with US Imaging's work;
- From reference checks Polk County (volunteer info on Sutterfield reference call) said US Imaging did good work, but when reverse imaging was used, the add-on pricing was expensive and over the estimate Polk County had been provided by US Imaging provided. US Imaging didn't honor its estimate.

Proposed Method of Performance and Contractor Support: Score 40 of 40

Strengths:

- US Imaging outlines a 3-stage process for scanning. Stage 1 begins with US Imaging conducting a thorough inventory of project documents before starting work. Their staff will scan each file and apply a barcode label before boxing. A complete inventory of files is given to the County before leaving the collection site. This ensures accuracy and transportation security;
- Transport with archival quality (double-walled) storage boxes – no County staff required for assistance to prepare for transport;
- US Imaging provides the boxes, and then boxes the files themselves – cost is built into scanning pricing confirmed in BAFO #3;
- Will track every file in each box (barcoding used) and provide contents of each box and label each box and label each individual file. Provides a complete inventory of files, boxes, and files within boxes before leaving County premises;
- Barcode labels are scanned each time a County box is moved on US Imaging's premises;
- US Imaging transports all boxes to Michigan facility with their own drivers. Each unique bar code label is scanned every time a box is moved so boxes are always tracked.
- Staff manually index's project number, document type & project name from file folder; those without all required information are flagged for further indexing after scanning. 100% of images are indexed by a second person and the 2 files are compared electronically to catch mismatches to make corrections. BAFO #3 clarifies that the indexing by a 2nd person and electronic comparison to the first set is an extra charge – an additional \$0.80 per document;
- US Imaging prepares documents for scanning – details include removing ACCO fasteners, staples & paper clips, mounting sticky notes on blank pages, unfolding, etc. They also refold oversize documents and return pages to ACCO fasteners. They do NOT re-staple or paper clip;
- All images are scanned at 300dpi and saved as color JPEG. All images are inspected on 27" portrait monitor and if any appear to have a problem due to scanner error or settings they are re-scanned at no charge;

- Services provided after scanning is complete include inspection of every scanned image for quality, grouping of images by folder project number & manual image enhancement of those images that may require legibility improvements;
- As part of its Stage 2 operations, US Imaging will provide documents on 2 external USB hard drives as requested and ship both to the County while retaining one. BAFO #3 states County will be charged for 3 USB drives if we get the 2 that we normally request and they follow their normal procedure
- US Imaging has a software search tool called ImageXpress, which will allow the County to search and view all scanned documents immediately after the scanning. If the record the County is searching for has not yet been scanned it will be uploaded within 24 hours of placing the request. This is quicker than the 3-5 business days specified in the RFP;
- US Imaging will double inspect, enhance & format as part of its Stage 3 operations. This includes: auto crop & de-skew, blank removal, index earlier missing info, converts to searchable pdf, etc.
- US Imaging storage facility in Saginaw, Michigan is secure and designed for document storage – proposal describes the dry fire suppression system and motion detectors as well as the building itself and its shelving system – all are temperature and humidity controlled.
- Dry fire suppression system on premises with interior loading docks;
- No sub-contractor;
- US imaging guarantees all their “Double Pass” images with 100% accuracy however BAFO #3 clarifies that double pass is an extra charge. US Imaging says that it guarantees 100% accuracy and warranties their work 100% forever – will correct any errors free;
- Provided samples of work as requested. The samples are satisfactory;
- Estimate on scanning work includes specific estimated numbers for add-on services like image enhancement (10%) and reverse dual polarity (20% of maps), and microfilm cassettes (73);
- Provided estimate of total number of microfilm cassettes (73) to contain scanned documents. The per cassette price multiplied by estimated number of cassettes equals the amount provided for US Imaging’s quoted Total Estimated Price (Non-Binding) for Microfilming Services.

Concerns:

- US Imaging’s representations on provision and charges for external hard drives was not initially clear and required repeated effort by the County to get a clear understanding in BAFO #3.
- Project Time: Notice of Award to Pickup – 45 days; actual scanning 320 days; total project takes 365 days to complete with final product delivery to County. BAFO #2 added microfilming and US Imaging indicated it would take “0” calendar days to microfilm and 5 total days to complete microfilming and deliver to County. This response required correction in US Imaging’s BAFO #4 response;
- US Imaging noted on its index pricing that it charges “per pass”. The County learned in BAFO #3 that per pass pricing for indexing represents additional charges to the County to ensure 100% accuracy;

- 5-hours estimated to conduct RVI interface which appears to underestimate interface work which is billed hourly; no cap provided;

OFFEROR #2: IMS Technology Group

X It has been determined that **IMS Technology Group** has submitted a **responsive** Statement of Qualifications meeting the requirements set forth in the original Request for Qualifications.

_____ It has been determined that **IMS Technology Group** has submitted a **non-responsive** Statement of Qualifications.

Experience, Expertise and Reliability of Offeror: Score 3 of 10

Strengths

- IMS has been providing scanning, microfilm conversion, document shredding & document management solutions to government institutions throughout Missouri since 2008;
- Reference performing similar projects for scanning but not microfilming. References are State of Missouri agencies (public government) but not Counties;
- From reference checks: Mo Dept of Conservation IMS did interface with Sharepoint & File Bound; Mo Dept of Correction IMS manages the Dept of Corrections document system.
- From reference checks: Missouri Department of Conservation had IMS interface with Sharepoint & File Bound; the Missouri Department of Corrections said that IMS manages the Department of Corrections document system;
- Staff assigned to project named and their backgrounds provided (the proposal describes what staff does but did not mention experience with specific document types). The County's point of contact will be Derek Clithero who has 3 years document management administration;
- Performed site visit (5/22/2023) prior to submitting proposal – offers degree of reliability having seen the project work.

Concerns:

- Only provided references were State of Missouri accounts and not counties; references were not familiar with IMS's performance doing work similar to the County project;
- The proposal says IMS performed microfilm work for the references, but neither the Missouri Department of Conservation or Missouri Department of Corrections had familiarity with microfilming work conducted by IMS;
- Additionally from reference checks: Only the Missouri Department of Conservation included plats & blueprints; the Missouri Department Corrections did not include documents larger than legal size;
- IMS has no direct experience performing microfilming – this is subcontracted out;
- IMS has no experience interfacing with an RVI system.

Proposed Method of Performance and Contractor Support: Score 13 of 40

Strengths:

- IMS will coordinate with County to arrange documents pick-up. Secure vehicle provided. All boxes are palletized and shrink-wrapped. A hand-ticket indicating number of boxes inventoried is provided to County to ensure accuracy; upon arrival at IMS facility all boxes are added to IMS's inventory and checked to confirm is accurate with what left the County; IMS is located in Mexico, Missouri – relatively close compared to other vendors;
- It wasn't clear if the County or if IMS staff box-up the documents. IMS's BAFO #3 clarifies that IMS staff will box documents for transport, but at additional cost to the County;
- Prior to collecting boxes IMS will collaborate with the County to determine the agreed upon means of identifying and cataloging the boxes and will make sure both the County and IMS share understanding the cataloguing method;
- Each package will be recorded and indexed at the box level (not the file level). This will assist "on-demand" records retrieval requests;
- After inventory is confirmed IMS will prep documents for scanning – remove staples, binders, paper clips, folds, etc. and insert barcode separator sheets. BAFO #3 confirms documents are returned to the original folder and folder to the original box after scanning;
- Prepared documents are scanned on high speed document scanners which capture both sides of the page and automatically eliminate blank pages;
- Scanners settings can be adjusted to meet County requirements for resolution and color profile;
- IMS uses double feed detection to prevent simultaneous pulling of multiple documents, page protection & multi-thickness support to enable scanning of various page thicknesses in the same file; automatic brightness adjustment to correct pages with light writing or text; and the production scanners can provide an automation document count at any point;
- IMS high speed production scanners set at 300 dpi bitonal imaging have a scan rate of 140 pages per minute/280 images per minute or approximately 400,000 document pages in a single business day. BAFO #3 clarifies County not charged for blank images, but the County must confirm if it will allow IMS to manually delete pages they feel are from bleed-through;
- IMS utilizes Psigen software that will flag items that do not meet image standards or indexing requirements. After these corrections are made the batch goes through compression software to optimize the file size for faster migration and smoother file operations;
- Pricing page indicates IMS will provide scanned documents on 2 USB thumb drives;
- On-demand records requests will be sent electronically to Resource Management within 2 business days of the request; this is quicker than the 3-5 business days specified in the RFP;
- Project Time: Notice of Award to Pickup – 15 days, actual scanning 105 days; total project takes 120 days to complete with final product delivery to County, BAFO #2 add

microfilming – response says 30 days for microfilming and total days to complete microfilming and deliver to County 45 days. Entire project will take 165 days;

- IMS's storage facility follows NAID-AAA protocols; state of the art security system; employees are background-checked; fire suppression system identified. BAFO #3 indicates that IMS doesn't have a dry fire suppression system but it does have continuous monitoring, a rapid response fire plan, and limited access to its building with rigorous security protocols in place to ensure document security at IMS's facility. IMS adheres to stringent environmental controls to maintain optimal conditions for data preservation;
- Project Consultation is 4-hours which is a half-day – seems realistic;

Concerns:

- County has to provide a cataloged list (with general overview of box contents) of the files prior to transport and maintain this list for use as a point of reference if the County should need record retrieval during the course of the project.
- Either County staff have to box documents for transport or the County has to pay IMS additionally for this service; other vendors built this service into their scanning pricing;
- IMS tracks by the box, not by the file like US Imaging.
- Only provide list of each box with A-z range of contents;
- Subcontract Reverse Dual Polarity work for scanning services to a firm in New York if reverse dual polarity service is needed – transport time to New York could add time to the expected project completion;
- No estimate on number of images that would require reverse polarity work (be subcontracted out);
- Estimate on work did not include estimated numbers for add-on services like reverse dual polarity, etc.;
- IMS does not create microfilm in-house – IMS partners with Penny Imaging Exchange to perform microfilm cassettes;
- Did not provide work samples;
Initially warranty only stated for 90-days; clarification required to ensure that IMS met RFP 12-month requirement;
- Microfilming estimated time is longer compared to their timeline for the scanning part, but the IMS's overall total project time is still much shorter compared to US Imaging and Sutterfield;
- Total Estimated Price (Non-Binding) for Microfilming Services comes out to 33.86 cassettes for the project which prompted the Evaluation Team to question IMS's assumptions about the microfilming work;
- 3-hours estimated to conduct RVI interface which appears to underestimate interface work which is billed hourly; no cap provided;
- IMS storage/work processing building does not have a fire suppression system; it has a fire alarm system.

OFFEROR #3: Sutterfield Technologies, Inc
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X It has been determined that **Sutterfield Technologies, Inc** has submitted a **responsive** Statement of Qualifications meeting the requirements set forth in the original Request for Qualifications.

_____ It has been determined that **Sutterfield Technologies, Inc** has submitted a **non-responsive** Statement of Qualifications.

Experience, Expertise and Reliability of Offeror Score 9 of 10

- Sutterfield Technologies is an imaging service that services counties and municipalities exclusively since 2012;
- 300 customers across US, including Counties in Missouri, Oklahoma, Texas, Arkansas, Nebraska, Kansas, New Jersey & Wisconsin – 30 million images performed by Sutterfield;
- References provided are other County offices – Jasper County specifically references plat maps; experience scanning plats and engineering drawings, some that were very old;
- Mentioned a staff of 20 technicians and indexing staff; provided detail on two staff who will be assigned to the County project;
- Assigned Single Point of Contact is Nathanael Sutterfield (Image Services Manager) – 20 years of programming, image services management, project management, image project scanning, indexing & image processing experience;
- Performed site visit (6/1/2023) prior to submitting proposal – offers degree of reliability having seen the project work.
- Sutterfield Technologies performed scanning work previously for the Boone County Resource Management Department - Resource Management was very satisfied with work and interaction with Richard Sutterfield.
- Sutterfield Technologies is familiar with Boone County's RVI requirements from previous Resource Management building permit project;
- From reference checks, Sutterfield has interfaced with imaging system for both Texas County & Polk County;
- From reference checks: Sutterfield performed microfilming for Polk County and took care of sending 1 set of microfilm cassettes to Polk County and 1 set to the Missouri Secretary of State;
- From reference checks: Actual project cost ended up being \$20,000 **less** than estimated project cost for Polk County;
- From reference checks: Polk County had experience with both US Imaging and Sutterfield and said that while both projects went well, Sutterfield honored its estimates;
- Work performed for Jasper County Clerk included creating archival microfilm from all images and project was completed in 2 months;
- Work performed for Hall County Assessor/Register of Deeds included creating 16mm COM microfilm from images and project was completed in 2 months.

Concerns:

- Assigned Technician has only 3 years' experience image project scanning, indexing & image processing;
- Proposal experience/customer service/responsiveness to County's requests not up to expectations (missed BAFO #1 deadlines) based on prior County experience;
- County had previous good experience working with Richard Sutterfield, but he is not named to lead this new project.

Proposed Method of Performance and Contractor Support Score 18 of 40**Strengths:**

- Files boxed & labeled with source of files (which cabinet/drawer) and inventoried at pickup – and the inventory list is given to the County at departure. County has no role in the inventorying process – Sutterfield will perform this task on its own. BAFO #3 confirms that Sutterfield will provide boxes and personnel to prepare files for transport without additional charges;
- Sutterfield Technologies will use company-owned vehicles driven by company employees to move records. Boxes are then re-inventoried at Sutterfield Technologies' location in Duncan, Oklahoma; County receives printed spreadsheet of files inventoried at Sutterfield location;
- Sutterfield has standardized procedures in place for scanning, processing, indexing and delivering images like the Boone County Resource Management project;
- Software tools used to produce superior images from even the most difficult source documents. Sutterfield has scanned thousands of plat maps & engineering drawing, many of which required special care and enhancement due to age and condition of originals;
- Sutterfield provides Resource Management with a PDF document for requesting files – document can be e-mailed or faxed and the on-demand records requests will be available to Resource Management within 3-5 business days of the request; County can request expedited service and receive the digital file within 1 business day;
- Pricing page indicates Sutterfield will provide scanned documents on 2 USB thumb drives;
- Provided estimates on duplicating multiple pages, image enhancement, and reversing dual polarity – all are zero.
- Access to facility is allowed only to employees. All customer materials are clearly labeled and stored in secure, key card controlled access areas. Each box is checked out by scanning technician and returned to the storage location after scanning. Controlled access areas are locked at night with building secured by a monitored alarm system. In its BAFO #3 response, Sutterfield identified smoke & fire detectors which trigger building alarm & notifies fire department, also have fire extinguishers in strategic locations, but no active fire suppression system, also have limited access, door sensors and motion detectors;
- No sub-contractor for scanning work or microfilming work – perform directly;
- Will warranty work as requested in RFP paragraph 3.4.6 (12 months);
- Microfilming projects length is addressed – will take 40 days to complete.

- Total Estimated Price (Non-Binding) – Microfilming Services – Estimated Total Price divided by per cassette price does equal a whole number – comes out to 35 cassettes;
- Project Consultation is included;
- Sutterfield has previously worked with Boone County importing scanned images into the County's RVI system;
- BAFO #3 confirms using scanning equipment that scans both sides of a document simultaneously, then blank pages are removed and not charged - offers to provide a separate file of blank images if the County wants to confirm blank pages.

Concerns:

- Did not provide work samples;
- Provided estimates of “zero” on reversing dual polarity which may not be realistic;
- Project Time: Notice of Award to Pickup – 60 days; Actual scanning - 300 days: Estimate total project takes 360 days to complete with final product delivery to County. BAFO #2 added microfilming which adds 40 calendar days to microfilm and changes total days for project completion to 385 days to deliver to County – accurate total would be 405 days.
- Sutterfield Technologies storage/work processing building does not have a fire suppression system; it has a fire alarm system.
- 60 hours for data/image programming (which is the highest estimate) was confirmed in BAFO #3 but it was also capped.

SUMMARY:

The Evaluation Team regarded the three vendors similar in terms of Experience, Expertise and Reliability. This area of the subjective evaluation was weighted a maximum 10 points. US Imaging scored 4 out of 10 points for Experience, Expertise and Reliability for presenting detail about their personnel's experience; all of US Imaging's identified staff have work experience relevant to the County's scanning projects, and the County's Point of Contact will be Mark Lystiuk who has specific experience working with Lands Records Management software and experience working with counties managing various projects for scanning land records, plats and surveys which is seen by the Evaluation Team as beneficial to the County, although he will not be the hands-on technician. US Imaging lost points for not having RVI experience and for reference information indicating that US Imaging does not, like Sutterfield Technologies, honor its estimates. IMS is awarded 3 of 10 points for Experience, Expertise and Reliability. Like US Imaging, IMS has indicated that it has experience performing similar scanning and microfilming projects and has experienced staff who would be assigned to perform services for the County. IMS's references were not County entities; they were both State of Missouri agencies and neither had experience with IMS performing microfilming work. Only one reference had experience with IMS's scanning work on documents larger than legal size; the County's scanning project will have several larger documents (plats, blueprints, etc.) IMS has no RVI experience and since it does not perform microfilming work directly, IMS's microfilming experience is not considered as strong as either US Imaging or Sutterfield Technologies. These reasons account for IMS's score in this area. Sutterfield Technologies scores 9 of 10 points for Experience, Expertise and

Reliability. The County has had previous successful experience with Sutterfield Technologies completing scanning work. Sutterfield Technologies provided references that are County entities like Boone County, and the references could speak to Sutterfield performing both scanning and microfilming work which was satisfactory. References were very supportive of working with Sutterfield Technologies. Of specific importance to the Evaluation Team, Sutterfield Technologies has successfully performed an RVI interface for Boone County. Sutterfield does not receive a perfect score for the following reasons: It is noted that Sutterfield mentions a staff of 20 but only describes the background for two personnel who would be assigned to the County's work. The County has previously worked with Mr. Richard Sutterfield who is not one of the identified two personnel named to be assigned to this new scanning and microfilming project. Sutterfield Technologies' delayed BAFO #1 response concerned the Evaluation Team which read the delay as indicative of delays that may be experienced by the County when assigning future work.

The subjective area of Proposed Method of Performance and Contractor Support was weighted a maximum 40 points. US Imaging is awarded 40 of 40 points in the area of Proposed Method of Performance and Contractor Support for the following primary reasons which the Evaluation Team determines distinguishes US Imaging in its approach to performing work for the County: US Imaging conducts a thorough inventory on its own of all documents prior to loading and transporting the documents to their facility in Saginaw, Michigan. Documents will be prepared for transport and barcoded/tracked at the file level – not by box or cabinet. Whenever a file is moved, it will be scanned by barcode. Archival-quality boxes will be used for transport. US imaging provides the County with a complete inventory of files, boxes, and files within boxes before leaving the County's premises. US Imaging's facility is superior in comparison to IMS and Sutterfield Technologies. The security of its facility is described with detail, and the facility is equipped with a dry fire suppression system, a temperature/humidity control system, and a security system. On-demand requests for documents will be available to the County in 24-hours which is the best turnaround for on-demand requests. US Imaging guarantees its work 100% **forever**. US Imaging, unlike the other offerors, provided actual work samples in their proposal and the samples provided good representations of quality work. US Imaging's proposal provided estimates for add-on scanning charges (10% for Image Enhancement, 20% Reverse Dual Polarity for maps that are scanned) and for microfilming cassettes (estimated 73 cassette) which was not similarly identified in the other two proposals. US Imaging will use no sub-contractors which is preferred by the Evaluation Team. Stage 3 services were represented as part of their normal operating procedure, but it was learned through the BAFO process that there's actually an up-charge for ensuring 100% accuracy which involves a second pass with additional charges. US Imaging estimates data processing at 5 hours which may be an underestimate given US Imaging has no experience performing an RVI interface.

IMS is awarded 13 of 40 points in the area of Proposed Method of Performance and Contractor Support for the following reasons: IMS conducts a through inventory of the files prior to transport but will recruit the County to help catalog and box the files for the inventory. IMS will prepare the files for transport on its own only at an additional cost which is unlike US Imaging and Sutterfield Technology which do all transport preparation work on their own. The security of its facility in Mexico, Missouri is described with detail indicating that NAID-AAA protocols are followed; it has a state-of-the-art security system; all employees are background-checked. IMS

does not have a fire suppression system; it has a fire alarm system. On-demand requests for documents will be available to the County in 2 business days which is longer than US Imaging's turn-around. IMS clarified that it guarantees its work consistent with RFP requirements after initially stating only a 90-day guarantee. IMS didn't provide work samples but US Imaging did. IMS anticipates 120 days to complete scanning work which is the best turnaround for the scanning work, and 45 days to complete microfilming work, which is the longest turnaround. IMS does not perform microfilming in-house and partners with Penny Image Exchange located in Holbrook, New York. IMS's 3-hour estimate for data project consultation seems to be an underestimate given that IMS hasn't interfaced with an RVI system. Project consultation is estimated at 4 hours and billed separately. IMS will use a sub-contractor located in New York for reverse dual polarity needed for scanning which is not preferred by the Evaluation Team. IMS didn't provide any estimate about the number of images that may require reverse polarity work.

Sutterfield Technologies is awarded 18 of 40 points in the area of Proposed Method of Performance and Contractor Support for the following reasons: Sutterfield Technologies conducts a through inventory of the files prior to transport, boxing and labeling County files on their own. The County will be provided with an inventory list the time of transport and at the time the boxes are re-inventoried at the Sutterfield storage location in Duncan, Oklahoma. The list provided by Sutterfield will be each box with an A-Z range of contents and a label linking to the County cabinet location where the file was collected from. Sutterfield Technologies' employees transport the documents in Sutterfield vehicles. Sutterfield's storage facility is described as having controlled access and an alarm system deployed at night. Sutterfield detailed in its BAFO #3 response its fire alarm system (an integrated smoke and fire detection sensor system connected to the building security system), but it does not have a dry suppression system like US Imaging. On-demand requests for documents will be available to the County in 3-5 business days which is the longest turn-around. Sutterfield Technologies guarantees its work consistent with RFP requirements. Sutterfield Technologies, didn't provide work samples which is preferred. Sutterfield Technologies anticipates 360 days to complete scanning work (which is longer than IMS), and 40 days to complete microfilming work. Sutterfield Technologies performs its own microfilming work and does not rely on a subcontractor or partner. Sutterfield Technologies will use no sub-contractors which is preferred by the Evaluation Team. Sutterfield Technologies has demonstrated successful experience interfacing with an RVI system and has estimated a firm maximum 60 hours to conduct the data programming for the interface work which Sutterfield Technologies offers as its limit on hours it will charge for in BAFO #3.

NOTE: The proposals from **Canon Solutions America** and **Global Solutions Group, Inc.** were short-listed and removed from consideration. The proposals are deemed **unacceptable** for award consideration for the following reasons:

Canon Solutions America: The proposal from Canon Solutions America contained a Master Service Agreement that contained several terms that were unacceptable to the County. The County requested that the Master Service Agreement be removed from the proposal in Best and Final Offer Request #1. Canon Solutions America declined to remove their Master Services Agreement. Refusing to allow the RFP terms to govern a

prospective Purchase Agreement made the proposal from Canon Solutions America unacceptable.

Global Solutions Group, Inc.: The proposal from Global Solutions Group was ultimately deemed unacceptable after repeated efforts the County employed to get the vendor to provide more detail about its proposed work. Global Solutions Group was asked in both Best and Final Offer Requests #1 and #2 to provide detail relevant to the Evaluation Team that would allow the evaluators to assess whether or not Global Solutions Group had an accurate sense of the volume of scanning and microfilming work the County required. It is noted that Global Solutions Group did not do a site visit prior to submitting their proposal to gauge the number of documents the County had for scanning and ultimately for microfilming. In BAFO #2, Global Solutions Group failed to provide a total estimate for microfilming, stating that the estimate was "Not Available as Exact Volume unknown." Global Solutions Group indicated "NA" for details about the time anticipated to conduct and finish microfilming work. In their Best and Final Offer #1 response, Global Solutions Group, Inc. stated "Unknown Services: If we come across any situation that has not been identified in RFP or Addendums, then we will reach out to the customer and identify a mutually agreed solution and associated cost." The initial offer contained similar disclaimers. As such, the Evaluation Team decided not to pursue this proposal further, declaring it unacceptable and incapable of final scoring.

RFP 27-19JUN23: IMS 1-Time Preparation for Transportation Cost					
			QTY	Unit \$	Total \$
Personnel Costs: 2-3 people, \$30/hour (will use 3 people work one full day)			24	\$ 30.00	\$ 720.00
Cube Box: \$8/Each			100	\$ 8.00	\$ 800.00
Oversized Plan Box \$10/Each			1	\$ 10.00	\$ 10.00
Grand Total Preparation Cost					\$ 1,530.00

Total Cost Comparison			
	IMS	Sutterfield	US Imaging
Line Item 5.9.2: Per Image Off-Site Price For all page sizes smaller than 11X17 (e.g., 8.5X11, 8.5X14, 8.5X5.5, 7X8.5)	\$ 3,291.98	\$ 19,743.65	\$ 10,626.94
Line Item 5.9.3: Per Image Off-Site Price For all 11X17 pages	\$ 161.27	\$ 967.23	\$ 624.75
Line Item 5.9.4: Per Image Off-Site Price For all 24X36 pages	\$ 1,585.79	\$ 2,090.77	\$ 7,000.20
Line Item 5.9.5: Per Image Off-Site Price For all 24X42 pages	\$ 10.58	\$ 13.91	\$ 55.58
Line Item 5.9.6: Per Image Off-Site Price For all 32X48 pages	\$ 10.58	\$ 13.91	\$ 70.74
Line Item 5.9.7: Indexing - per pdf image/document off-site for all page sizes	\$ -	\$ 13,894.96	\$ 9,936.49
Line Item 5.9.8: Duplicate multiple document pages per image off-site for all page sizes	\$ -	\$ 0.61	\$ 0.24
Line Item 5.9.10: Image enhancement per image off-site for all page sizes	\$ 72.11	\$ 1,005.94	\$ 2,343.97

Total Cost Comparison			
	IMS	Sutterfield	US Imaging
Line Item 5.9.11: Reverse dual polarity per image off-site for all page sizes	\$ 108.17	\$ 1,103.29	\$ 288.49
Line Item 5.9.12: Project Management/Consultation per hour	\$ 1,683.94	\$ 1,066.87	\$ 1,515.77
Line Item 5.9.13: Data processing programming necessary for file interface per hour	\$ 11,308.94	\$ 5,710.52	\$ -
Line Item 5.9.14: USB Thumb Drive per each	\$ 430.46	\$ 509.00	\$ 1,065.77
Line Item 5.9.15: Per image Off-Site for 18X24 Page	\$ 2,217.50	\$ 2,923.70	\$ 5,206.26
Line Item 5.9.16: Total firm price to load scanned images onto a 35mm microfilm cassette - all materials, supplies, labor & support	\$ 19,752.63	\$ 25,157.67	\$ 16,573.49
TRANSPORTATION	\$ 500.00	\$ 2,729.86	\$ 7,000.00
PREP FOR TRANSPORTATION COSTS	\$ 1,530.00	\$ -	\$ -
GRAND TOTAL PRICE	\$ 42,663.95	\$ 76,931.90	\$ 62,308.68
Cost Points: 50 Maximum Lowest\$/Compared\$ X 50 = Cost Points	50	28	34

RFP 27-19JUN23 - Off-Site Scanning Service																		
Bidders:																		
			IMS Technology Group	IMS Technology Group		IMS Technology Group	IMS Technology Group		IMS Technology Group	IMS Technology Group		IMS Technology Group	IMS Technology Group		IMS Technology Group	IMS Technology Group		IMS Technology Group
Cost Evaluation	QTY - Initial Year	QTY - Renewal Years	Unit Price Original Contract Period	Extended Price Original Contract Period		Unit Price First Renewal Contract Period	Extended Price First Renewal Contract Period		Unit Price Second Renewal Contract Period	Extended Price Second Renewal Contract Period		Unit Price Third Renewal Contract Period	Extended Price Third Renewal Contract Period		Unit Price Fourth Renewal Contract Period	Extended Price Fourth Renewal Contract Period		GRAND TOTAL - ALL CONTRACT PERIODS
Line Item 5.9.2: Per Image Off-Site Price For all page sizes smaller than 11X17 (e.g., 8.5X11, 8.5X14, 8.5X5.5, 7X8.5)	28,142	2,814	\$ 0.08	\$ 2,251.36		\$ 0.08	\$ 225.12		\$ 0.09	\$ 258.89		\$ 0.09	\$ 258.89		\$ 0.11	\$ 297.72		\$ 3,291.98
Line Item 5.9.3: Per Image Off-Site Price For all 11X17 pages	1,378	138	\$ 0.08	\$ 110.24		\$ 0.08	\$ 11.04		\$ 0.09	\$ 12.70		\$ 0.09	\$ 12.70		\$ 0.11	\$ 14.60		\$ 161.27
Line Item 5.9.4: Per Image Off-Site Price For all 24X36 pages	984	99	\$ 1.10	\$ 1,082.40		\$ 1.10	\$ 108.90		\$ 1.27	\$ 125.24		\$ 1.27	\$ 125.24		\$ 1.45	\$ 144.02		\$ 1,585.79
Line Item 5.9.5: Per Image Off-Site Price For all 24X42 pages	5	1	\$ 1.10	\$ 5.50		\$ 1.10	\$ 1.10		\$ 1.27	\$ 1.27		\$ 1.27	\$ 1.27		\$ 1.45	\$ 1.45		\$ 10.58
Line Item 5.9.6: Per Image Off-Site Price For all 32X48 pages	5	1	\$ 1.10	\$ 5.50		\$ 1.10	\$ 1.10		\$ 1.27	\$ 1.27		\$ 1.27	\$ 1.27		\$ 1.45	\$ 1.45		\$ 10.58
Line Item 5.9.7: Indexing - per pdf image/document off-site for all page sizes	5,904	60	\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
Line Item 5.9.8: Duplicate multiple document pages per image off-site for all page sizes	1	1	\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
Line Item 5.9.10: Image enhancement per image off-site for all page sizes	3,601	1	\$ 0.02	\$ 72.02		\$ 0.02	\$ 0.02		\$ 0.02	\$ 0.02		\$ 0.02	\$ 0.02		\$ 0.03	\$ 0.03		\$ 72.11
Line Item 5.9.11: Reverse dual polarity per image off-site for all page sizes	3,601	1	\$ 0.03	\$ 108.03		\$ 0.03	\$ 0.03		\$ 0.03	\$ 0.03		\$ 0.03	\$ 0.03		\$ 0.04	\$ 0.04		\$ 108.17
Line Item 5.9.12: Project Management/Consultation per hour	5	1	\$ 175.00	\$ 875.00		\$ 175.00	\$ 175.00		\$ 201.25	\$ 201.25		\$ 201.25	\$ 201.25		\$ 231.44	\$ 231.44		\$ 1,683.94
Line Item 5.9.13: Data processing programming necessary for file interface per hour	60	1	\$ 175.00	\$ 10,500.00		\$ 175.00	\$ 175.00		\$ 201.25	\$ 201.25		\$ 201.25	\$ 201.25		\$ 231.44	\$ 231.44		\$ 11,308.94
Line Item 5.9.14: USB Thumb Drive per each	2	1	\$ 65.00	\$ 130.00		\$ 65.00	\$ 65.00		\$ 74.75	\$ 74.75		\$ 74.75	\$ 74.75		\$ 85.96	\$ 85.96		\$ 430.46
Line Item 5.9.15: Per image Off-Site for 18X24 Page	1,378	138	\$ 1.10	\$ 1,515.80		\$ 1.10	\$ 151.80		\$ 1.27	\$ 174.57		\$ 1.27	\$ 174.57		\$ 1.45	\$ 200.76		\$ 2,217.50
Line Item 5.9.16: Total firm price to load scanned images onto a 35mm microfilm cassette - all materials, supplies, labor & support - Price per each 35 mm Cassette	45	5	\$ 290.00	\$ 13,050.00		\$ 290.00	\$ 1,450.00		\$ 333.50	\$ 1,667.50		\$ 333.50	\$ 1,667.50		\$ 383.53	\$ 1,917.63		\$ 19,752.63
Line Item 5.10.1.1: 1st Renewal Option Price Adjustment			0%												TOTAL PRICE		\$ 40,633.95	
Line Item 5.10.1.2: 2nd Renewal Option Price Adjustment			15%												One-Time Cost for IMS to Prepare File for Transport - See File Memo		\$ 1,530.00	
Line Item 5.10.1.3: 3rd Renewal Option Price Adjustment			0%												TOTAL PRICE w/ FILE PREPARATION COSTS - See Memo		\$ 42,163.95	
Line Item 5.10.1.4: 4th Renewal Option Price Adjustment			15%															

RFP 27-19JUN23 - Off-Site Scanning Service																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																										
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