

REPORT FROM EVALUATION COMMITTEE
REQUEST FOR PROSPOSALS FOR REQUIREMENTS CONTRACT FOR
DOCUMENT IMAGING AND INDEXING
RFP No. 12401718

COMMITTEE MEMBERS:

JENNIFER LAIRD – Executive Assistant to Dept Director, Planning and Development
Department Administration and Management

JANEL SHOWERS – Senior Management Analyst, Planning and Development Current
Planning Division

KRISTINE LONGORIA – Project Manager, Planning and Development Department
Housing Development Division

FACILITATORS:

JAMES JACKSON – Senior Procurement Specialist, General Services Department

CHRISTIAN CORS – Account Auditor II, Planning and Development Department
Administration and Management

NADIA SALINAS – Project Manager, Planning and Development Department
Administration and Management

BACKGROUND

As part of the previously required daily business operations of the Planning and Development Department, hard copies of files, plans, documents, permits, reports, etc. were generated and subsequently kept in perpetuity within City Hall. The department has approximately 250 boxes of files to maintain since the 1960s. Since 2020 the City of Fresno has converted most of its daily business to electronic submittals as it had to accommodate for the new change and keep up with the new industry standard. While staff anticipates maintaining the hard copy files in an off-site storage facility, the files, and documents, due to their age and exposure to the elements over the years are deteriorating and taking up a lot of space Furthermore, there is no backup to these documents, files, and plans should they be destroyed.

Through the RFP process staff requested proposals from qualified and responsible vendors to provide document imaging and indexing services and the committee concluded ARC Document Solutions was the best value for the City of Fresno. ARC Document Solutions is a well-known company that scans and coordinates the archiving of documents, plan sheets, etc. for many cities, counties, and school districts nationwide. It is recommended that a contract between the City of Fresno and ARC Document Solutions be approved for the amount not to exceed \$50,000.

Once the documents, files and plans are scanned, indexed, and archived, the city will have an electronic version of the files for safekeeping and uploading into the departments permitting/planning software program for future use by staff and the public. Electronic files will also streamline the research process and assist with the Public Records Act for document retrieval. In addition, the hard copy files and documents will then be able to be stored away in

boxes out of the elements, thus limiting further damage to them and freeing up space in City Hall for other uses.

The awarded services will be required to provide document imaging and indexing for approximately 250 banker boxes.

The request is for services to begin TBD and continue through TBD At the conclusion of the RFP, seven vendors submitted proposals, which are as follows:

1. Advanced Microsystems
2. ARC Document Solutions, LLC
3. Capital Typing Proposal
4. Crisp Imaging
5. MetaSource
6. Ubeo Ray Morgan Company
7. VDS Peltola Inc (Valley Document Solutions).

SIGNIFICANT EVENTS

RFP Release – January 24, 2024

RFP Deadline – February 20, 2024

Final Committee Evaluation – March 11, 2024

EVALUATION FOR DETERMINATION OF COMPETITIVE RANGE

To establish a competitive range, the following factors as identified in the Document Imaging and Indexing Comparison Document (see attachment) were evaluated. For reference, the criteria are listed below:

1. Cost as shown on the proposal form.
2. Ability to meet the stated operation and service requirements.
3. Past Performance and Experience based on References and experience shown on.
4. Conformance to the terms and conditions of the RFP
5. Other related information as needed.

COMPETITIVE RANGE DETERMINATION

The committee determined that it would use a scale of "Does Not Meet Standards", "Meets Standards", and "Exceeds Standards" to evaluate proposals.

COMMITTEE NOTES

The committee was provided with all the proposals prior to meeting on March 6, 2024. While the committee reviewed and rated each proposal, they found most proposals met the requirements of the RFP "meets standards" but there was one proposal that stood out overall. Panelists did note several strengths in the proposal for ARC Document Solutions including: 1) significant experience and resources in digitizing documents and administering similar services to public agencies; 2) multiple facilities throughout California; 3) a guaranteed document retrieval within 24 hours; 4) tracking every box using barcodes; and 5) clear processes shown for each step of the project. Additionally, ARC was the most economical per sheet and overall proposal received. The

evaluation committee unanimously agreed that ARC's proposal demonstrated their ability to execute the program requirements outlined in the RFP and they are very qualified to provide document imaging and indexing services. Refer to matrix for all other proposal ratings.

1. Advanced Microsystems: 1) Cost: 1) Cost: Proposer's cost does not meet standards as it is not within the margin of budget. 2) Ability: Exceeds standards committee found Proposer had several qualities and met several of the requirements. The ability to access a website to monitor work progress and all technicians have several years of experience. 3) Past Performance and Experience based on References and experience shown on: Exceeds standards Proposer has several years of experience and a very extensive background working with and on other City and State projects. 4) Conformance: Meets standards provided all documentation and items listed on checklist. 5) Other: Exceeds standards provided clear scope of work, employee low turnover and imaging dpi quality was good.
2. ARC Document Solutions: See information above.
3. Capital Typing Proposal: 1) Cost: Proposer's cost exceeds standards and is well within the budget margin. 2) Ability: Meets standards committee found Proposer met several of the requirements, provided case studies, equipment listings, and timeline but the location is out of State. 3) Past Performance and Experience based on References and experience shown on: Exceeds standards Proposer has several years of experience and a very extensive background working with and on other City and State projects. 4) Conformance Meets standards provided all documentation and items listed on checklist. 5) Other: Does not meet standards concern for items leaving California. Even though local preference wasn't a factor we chose to stay within California.
4. Crisp Imaging: 1) Cost: Proposer's cost does not meet standards as it is not within the margin of budget. 2) Ability: Does not meet standards, did not provide sufficient documentation and/or information on processes. 3) Past Performance and Experience based on References and experience shown on: Meets standards Proposer has several years of experience but minimal work experience within City and State projects. 4) Conformance: Meets standards provided all documentation and items listed on checklist. 5) Other: Does not meet standards, did not provide detailed information for each category.
5. MetaSource: 1) Cost: Proposer's cost does not meet standards as it is not within the margin of budget. 2) Ability: Proposer meets standards by having a secure location and certifying all employees. 3) Past Performance and Experience: Based on references and experience proposer exceeds standards with 30+ years of experience and an extensive background working on other City and State projects. 4) Conformance: Meets standards as proposer provided all documentation and items listed on the checklist. 5) Other: Meets standards by providing additional data tables on time, cost, and scope.
6. Ubeo Ray Morgan Company: 1) Cost: Proposer's cost does not meet standards as it is not within the margin of budget. 2) Ability: Exceeds standards as committee found proposer was local and has successfully worked with the city on other projects. 3) Past Performance and Experience: Meets standards on references and experience but their experience did not stand out to committee members on the proposal. 4) Conformance: Meets standards as proposer provided all documentation and items listed on the checklist. 5) Other: Meets standards by providing details on software and equipment as well as a dashboard.

7. VDS Peltola Inc (Valley Document Solutions): 1) Cost: Proposer's cost does not meet standards as it is not within the margin of budget. 2) Ability: Does not meet standards, committee found proposer hires third party vendors to complete the work. 3) Past Performance and Experience: Based on references and experience, proposer meets standards as they have worked with other City and State projects. 4) Conformance: Meets standards by providing all documentation and items listed on the checklist. 5) Other: Does not meet standards as no organizational chart was provided.

SUMMARY RECOMMENDATION

Based on the proposals received, the committee recommends the subrecipient agreement for Document Imaging and Indexing services in the amount not to exceed \$50,000 be awarded to ARC Document Solutions, LLC.