

**APPROVED**

AI-46546

Purchasing Department 20. C. 1.

CC - REGULAR

Meeting Date: 09/30/2014

Submitted For: Hon. A Guajardo,  
Jr.-HC-Clk.

Submitted By: Yolanda Velasquez, PURCHASING DEPT.

Department: PURCHASING DEPT.

**Information**

**CAPTION**

A. Presentation of scoring grid for the purposes of ranking by Commissioners' Court, the responses received in connection with the Request for Proposals for: "**Records Management & Document Imaging Process**"- RFP 2014-286-09-03:

| COMPANY  | AVERAGE SCORE | RANKED |
|--|---------------|--------|
| ✓ Kofile Systems, Inc                              | 95.60         | 1      |
| Property Info Corporation                          | 76.40         | 3      |
| Xerox Services (Government Records Services, Inc.) | 77.60         | 2      |

B. Requesting authority for Purchasing Department to proceed to negotiate a "Best and Final Offer" with the number one ranked company of Kofile Systems, Inc. for the provision of "**Record Management & Document Imaging Process**" for Hidalgo County Clerks' Office.

**BACKGROUND**

**Fiscal Impact**

**FISCAL YEAR:** 2014

**ACCT. #:** 4-1237-415-40-180-003-0-341

**FUNDS AVAILABLE Y/N?:**

**MATCHING FUNDS Y/N?:**

**BUDGETARY IMPACT:**

Available balance as of 9-25-14 \$69,345.16

**Attachments**

Acceptance-Participation Sheets-2014-286

Scoring Grid-2014-286

**Form Review**

**Inbox**  
Purchasing Department  
Budget & Management  
Manuel Chapa  
Auditor's Office

**Reviewed By**  
Darlene Betancourt  
Debbie Tamez  
Manuel Chapa  
Monica Badillo

**Date**  
09/24/2014 11:58 AM  
09/24/2014 02:08 PM  
09/25/2014 10:24 AM  
09/26/2014 05:46 PM

Form Started By: Yolanda Velasquez

Started On: 09/17/2014 09:06 AM

Final Approval Date: 09/26/2014

**HIDALGO COUNTY-RFP № 2014-286-09-03-YZV**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**SCORING GRID**

|  | <b>PROPOSERS</b> |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |
|--|------------------|----|----|----|----|----------------------|----|----|----|----|--------------|----|----|----|----|
|  | <b>KOFILE</b>    |    |    |    |    | <b>PROPERTY INFO</b> |    |    |    |    | <b>XEROX</b> |    |    |    |    |
|  | GRADERS          |    |    |    |    | GRADERS              |    |    |    |    | GRADERS      |    |    |    |    |
|  | 1                | 2  | 3  | 4  | 5  | 1                    | 2  | 3  | 4  | 5  | 1            | 2  | 3  | 4  | 5  |
| <b>UNDERSTANDING THE SERVICES/METHODOLOGY:</b><br>Company must state the approach and/or methodology in achieving and rendering all services required by the county of Hidalgo.  | 25               | 25 | 25 | 25 | 25 | 23                   | 25 | 25 | 20 | 21 | 20           | 25 | 20 | 20 | 19 |
|  |                  |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |
| <b>ABILITY TO COMMIT TO ALL SERVICES REQUIRED:</b><br>Company should provide as much background information as to its experience in providing similar services to City, County or any other governmental agencies. Reference information should be as current as possible, especially contact persons and telephone numbers. | 30               | 30 | 25 | 30 | 25 | 25                   | 20 | 23 | 15 | 20 | 20           | 20 | 20 | 15 | 18 |
|  |                  |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |
| <b>EAST OF SUPPORT SYSTEM &amp; RESPONSE TIME:</b><br>Ease of communicating with company's support system and the company's ability to have trained response team/person at service site. Qualified/trained response team (person) should be able evaluate, diagnose and/or begin service immediately.                       | 18               | 20 | 20 | 20 | 24 | 17                   | 20 | 18 | 10 | 20 | 15           | 10 | 18 | 10 | 19 |
|  |                  |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |
| <b>COST FEES AND WARRANTY:</b><br>In considering the proposals, the Hidalgo County reserves the right to select the acceptable applicant who offers contractual terms and conditions that are most advantageous, including but not limited to software price and services price per day/hour.                                | 24               | 20 | 23 | 20 | 24 | 20                   | 20 | 20 | 0  | 20 | 25           | 25 | 25 | 20 | 24 |
|  |                  |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |
| <b>Total</b>   | 97               | 95 | 93 | 95 | 98 | 85                   | 85 | 86 | 45 | 81 | 80           | 80 | 83 | 65 | 80 |
| <b>TOTAL SCORES</b>  | 478              |    |    |    |    | 382                  |    |    |    |    | 388          |    |    |    |    |
| <b>TOTAL AVERAGES</b>  | 95.60            |    |    |    |    | 76.40                |    |    |    |    | 77.60        |    |    |    |    |
| <b>RANKING</b><br>(Upon review and approval by Hidalgo County CC)  |                  |    |    |    |    |                      |    |    |    |    |              |    |    |    |    |



# MEMORANDUM

(IMMEDIATE REVIEW AND RESPONSE REQUIRED)

#1

2812 SOUTH BUSINESS HIGHWAY 281 ★ EDINBURG, TEXAS 78539★TEL: (956) 318-2626 ★ FAX: (956) 318-2629

**TO:** All Members of Evaluation Committee  
Proposal Evaluation Committee Team Member

**FROM:** Yolanda Velasquez, Buyer II, Hidalgo County Purchasing Department

**DATE:** September 09, 2014

**SUBJECT:** Request for Proposals (RFP) "Records Management & Document Imaging Process" 2014-286-09-03-YZV

Evaluation Committee members who will be grading, scoring and evaluating the responses received for the above referenced project, enclosed for your grading, scoring and evaluation task is the following;

Hidalgo County Purchasing Department received Proposals (RFP's) on Wednesday, September 03, 2014 for the above mentioned project. Three (3) responses were received and a copy of each is attached.

In accordance with the County Purchasing Act, the above-referenced project was issued as a competitive proposal (RFP) and, therefore, all information contained in the response(s) is to be kept **CONFIDENTIAL** until award and final approval of contract by Hidalgo County Commissioner's Court.

Until that time, and due to the confidential nature of these proposals, **no discussion of these proposals shall occur with anyone outside the Purchasing Department for questions, clarifications, information or guidance.** The RFP Packet with ALL of its contents cannot not be reproduced for any reason and must be returned to Buyer in its entirety (including the grading/scoring sheets) after the evaluation is complete.

The entire procurement packet is included so that you can review the project and the evaluation criteria that will be utilized to determine which firm submitted the most responsible and best value proposals. **PLEASE BE ADVISED AND INSTRUCTED THAT THE SCORING, GRADING AND EVALUATING OF EACH RESPONSE IS TO BE COMPLETED INDIVIDUALLY and PRIVATELY.** The following protocol is to be utilized for purposes of evaluating all proposals;

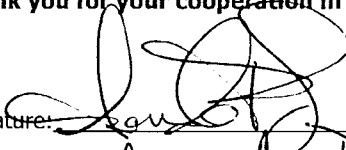
- o Review the RFP and become thoroughly familiar with the solicitation request/packet;
- o Review the Evaluation Form to be familiar with the Criteria that is listed;
- o Review the proposals making notes as you go relative to how well they meet the evaluation criteria;
- o Scoring Sheets are provided. Please make any notations necessary to document your scores.
- o Evaluate each firm against the criteria, not each other.
- o Scores are given up to the percentage available in the category.
- o The evaluation consists of a total of one hundred (100) point scoring system with 100 points being the best.

After completing your evaluation, All documentation including responses and evaluation forms must be returned by no later than **1:30 p.m., Friday, September 19, 2014.**

I understand the above information and instruction and agree to not reveal any content of any proposal to anyone. I will not discuss any details, contents or aspects of the responses. I will report any vendor contact concerning this evaluation process or any undue influence on my evaluation of proposal to the responsible buyer at the Purchasing Department. Any committee member may request a "joint meeting of the members" if felt that it is warranted and necessary.

**Please sign below and acknowledge that you have read the instructions and will honor all the aspects of your most important task including the Confidentiality clause. Thereafter, return said memorandum (via email) to: yolanda.velasquez@co.hidalgo.tx.us or fax (956) 318-2629.**

**Thank you for your cooperation in this important matter.**

Signature:   
Printed Name: Armando Perez Jr

Date: 9/19/2014

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>   | <u>Range</u> | <u>Point Score</u> |
|----|---|--------------|--------------------|
| 1. | Understanding the Services/Methodology  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Seems to understand all the services and methodology and seems to be able to adjust to whatever we will need</u>      |              |                    |
| 2. | Ability to Commit to all Services Required  | 30 points    | <u>30</u>          |
|    | Comments/Rationale for Points: <u>Looks like they are capable to commit to all the services as required and even grow as we go forward.</u>             |              |                    |
| 3. | Ease of Support System & Response Time  | 20 points    | <u>18</u>          |
|    | Comments/Rationale for Points: <u>Their support systems looks to be readily available.</u>  |              |                    |
| 4. | Cost Fees and Warranty  | 25 points    | <u>24</u>          |
|    | Comments/Rationale for Points: <u>Their fees &amp; warranty are very good in comparison to the other bids, for everything they are going to provide</u> |              |                    |
|    | Total Score   | <u>97%</u>   | 100%               |

Provider: Kofile

Evaluator: Armando Perez Jr

Date: 9/18/2014

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | <b>Understanding the Services/Methodology</b>  | 25 points    | <u>23</u>          |
|    | Comments/Rationale for Points: <u>They seem to understand the services and methodology, but will not adhere to a couple of services as per their cover letter.</u> |              |                    |
| 2. | <b>Ability to Commit to all Services Required</b>  | 30 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>looks like they are not willing to commit to all the services we require.</u>  |              |                    |
| 3. | <b>Ease of Support System &amp; Response Time</b>  | 20 points    | <u>17</u>          |
|    | Comments/Rationale for Points: <u>Seems compatible to everyone else.</u>   |              |                    |
| 4. | <b>Cost Fees and Warranty</b>  | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Their fees just are way high compared to the other bids that are able to do the same thing.</u>                                  |              |                    |
|    | Total Score  | <u>85%</u>   | 100%               |

Provider: Property Info.

Evaluator: Armando Perez Jr

Date: 9/18/2014

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>   | <u>Range</u> | <u>Point Score</u> |
|----|---|--------------|--------------------|
| 1. | Understanding the Services/Methodology  | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>They understand the services and methodology for the project, but lack in providing it.</u> |              |                    |
| 2. | Ability to Commit to all Services Required  | 30 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Have lacked in committing to providing all the required services, when asked for them.</u>  |              |                    |
| 3. | Ease of Support System & Response Time  | 20 points    | <u>15</u>          |
|    | Comments/Rationale for Points: <u>Their support system and response time has been slow and sometimes unavailable.</u>         |              |                    |
| 4. | Cost Fees and Warranty  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Their cost fees and warranty are highly competitive with everyone else.</u>                 |              |                    |

Total Score

80% 100%

Provider: XEROX

Evaluator: Armando Perez Jr.

Date: 9/18/2014



# MEMORANDUM

(IMMEDIATE REVIEW AND RESPONSE REQUIRED)

#2

2812 SOUTH BUSINESS HIGHWAY 281 ★ EDINBURG, TEXAS 78539 ★ TEL: (956) 318-2626 ★ FAX: (956) 318-2629

**TO:** All Members of Evaluation Committee  
Proposal Evaluation Committee Team Member

**FROM:** Yolanda Velasquez, Buyer II, Hidalgo County Purchasing Department

**DATE:** September 09, 2014

**SUBJECT:** Request for Proposals (RFP) "Records Management & Document Imaging Process" 2014-286-09-03-YZV

Evaluation Committee members who will be grading, scoring and evaluating the responses received for the above referenced project, enclosed for your grading, scoring and evaluation task is the following;

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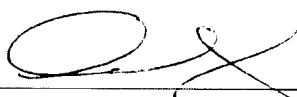
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**Thank you for your cooperation in this important matter.**

Signature: 

Printed Name: Annette C. Muniz

Date: 9/18/14

HIDALGO COUNTY CLERK'S OFFICE  
"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"  
RFP NO: 2014-286-09-03-YZV

RFP EVALUATION FORM

| <u>Selection Criteria</u>   | <u>Range</u> | <u>Point Score</u> |
|---|--------------|--------------------|
| 1. Understanding the Services/Methodology   | 25 points    | <u>25</u>          |
| Comments/Rationale for Points: <u>Company has experienced</u><br><u>staff with years of experience</u>  |              |                    |
| 2. Ability to Commit to all Services Required   | 30 points    | <u>30</u>          |
| Comments/Rationale for Points: <u>Vendor has committed</u><br><u>to all services, plus additional</u><br><u>services</u>  |              |                    |
| 3. Ease of Support System & Response Time   | 20 points    | <u>20</u>          |
| Comments/Rationale for Points: <u>Vendor agrees to have</u><br><u>additional equipment accessible in case</u><br><u>of break down. System is web based which</u><br><u>will allow vendor immediate access to address issues</u> |              |                    |
| 4. Cost Fees and Warranty   | 25 points    | <u>20</u>          |
| Comments/Rationale for Points: <u>Higher cost, however</u><br><u>offset with lower index fee.</u>   |              |                    |
| Total Score   | <u>95%</u>   | 100%               |

Provider: Kodak

Evaluator: [Signature]  
Annette C. Munz


Date: 9/18/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | <b>Understanding the Services/Methodology</b>  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Company has excellent understanding of service</u> |              |                    |
| 2. | <b>Ability to Commit to all Services Required</b>                                    | 30 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Company unable to commit to all requests.</u>      |              |                    |
| 3. | <b>Ease of Support System &amp; Response Time</b>                                    | 20 points    | <u>20</u>          |
|    | Comments/Rationale for Points: _____   |              |                    |
| 4. | <b>Cost Fees and Warranty</b>  | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Overall expensive</u>                              |              |                    |
|    | <b>Total Score</b>   | <u>85%</u>   | <b>100%</b>        |

Provider: Property Inf

Evaluator:   
 Annette C. Mudio

Date: 9/18/2014

HIDALGO COUNTY CLERK'S OFFICE  
"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"  
RFP NO: 2014-286-09-03-YZV

RFP EVALUATION FORM

|    | <u>Selection Criteria</u>   | <u>Range</u> | <u>Point Score</u> |
|----|---|--------------|--------------------|
| 1. | Understanding the Services/Methodology  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Company has good</u><br><u>understanding of services required</u> |              |                    |
| 2. | Ability to Commit to all Services Required  | 30 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Company under performed</u><br><u>for the last few years</u>      |              |                    |
| 3. | Ease of Support System & Response Time  | 20 points    | <u>10</u>          |
|    | Comments/Rationale for Points: <u>Company does not</u><br><u>provide immediate support</u>          |              |                    |
| 4. | Cost Fees and Warranty  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: _____  |              |                    |

Total Score 80% 100%

Provider: Xerox

Evaluator: [Signature]  
Annette C. Muniz

Date: 9/18/14



#3

# MEMORANDUM

(IMMEDIATE REVIEW AND RESPONSE REQUIRED)

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Thank you for your cooperation in this important matter.

Signature: \_\_\_\_\_

Date: 9/15/14

Printed Name: Noe Lopez Jr

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|                    | <u>Selection Criteria</u>   | <u>Range</u> | <u>Point Score</u> |
|--------------------|---|--------------|--------------------|
| 1.                 | <b>Understanding the Services/Methodology</b>   | 25 points    | <u>25</u>          |
|                    | Comments/Rationale for Points: <u>Fully understands SVC's required</u><br><u>Also exceeds system requirements.</u>  |              |                    |
| 2.                 | <b>Ability to Commit to all Services Required</b>   | 30 points    | <u>25</u>          |
|                    | Comments/Rationale for Points: <u>Commitment to providing services.</u>   |              |                    |
| 3.                 | <b>Ease of Support System &amp; Response Time</b>   | 20 points    | <u>20</u>          |
|                    | Comments/Rationale for Points: <u>Remote support for web based</u><br><u>system. Quick response time for on-site repairs.</u><br><u>On site backup equipment.</u> |              |                    |
| 4.                 | <b>Cost Fees and Warranty</b>   | 25 points    | <u>23</u>          |
|                    | Comments/Rationale for Points: <u>Good pricing of both installation</u><br><u>&amp; hardware</u>  |              |                    |
| <b>Total Score</b> |   | <u>93%</u>   | 100%               |

Provider: Kofile

Evaluator: Noe Lopez Jr.

Date: 9/16/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | Understanding the Services/Methodology   | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Good overall approach on identifying services to be performed.</u>   |              |                    |
| 2. | Ability to Commit to all Services Required   | 30 points    | <u>23</u>          |
|    | Comments/Rationale for Points: <u>As identified on cover page does not commit to certain specification of scope.</u>                             |              |                    |
| 3. | Ease of Support System & Response Time   | 20 points    | <u>18</u>          |
|    | Comments/Rationale for Points: <u>SaaS based system requires Tech on donor systems. Requires county personal to perform functions of vendor.</u> |              |                    |
| 4. | Cost Fees and Warranty   | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>pricing is a bit higher than other proposals.</u>  |              |                    |
|    | Total Score  | <u>86%</u>   | 100%               |

Provider: Property Info

Evaluator: Noe Lopez Jr.

Date: 9/16/14

**HIDALGO COUNTY CLERK'S OFFICE  
 "RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"  
 RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | <b>Understanding the Services/Methodology</b>  | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Fair on SVC's</u>  |              |                    |
| 2. | <b>Ability to Commit to all Services Required</b>  | 30 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>As existing vendor has not committed to any major improvements to technology</u>                                 |              |                    |
| 3. | <b>Ease of Support System &amp; Response Time</b>  | 20 points    | <u>18</u>          |
|    | Comments/Rationale for Points: <u>Support system is not exceptional. S/R based requires tech on site. Co. personnel to do functions of vendor.</u> |              |                    |
| 4. | <b>Cost Fees and Warranty</b>  | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Overall low pricing on services</u>  |              |                    |
|    | <b>Total Score</b>   | <u>83%</u>   | <b>100%</b>        |

Provider: Xerox

Evaluator: Noe Lopez Jr.

Date: 9/16/14



#21

# M E M O R A N D U M

(IMMEDIATE REVIEW AND RESPONSE REQUIRED)

2812 SOUTH BUSINESS HIGHWAY 281 ★ EDINBURG, TEXAS 78539 ★ TEL: (956) 318-2626 ★ FAX: (956) 318-2629

**TO:** All Members of Evaluation Committee  
Proposal Evaluation Committee Team Member

**FROM:** Yolanda Velasquez, Buyer II, Hidalgo County Purchasing Department

**DATE:** September 09, 2014

**SUBJECT:** Request for Proposals (RFP) "Records Management & Document Imaging Process" 2014-286-09-03-YZV

Evaluation Committee members who will be grading, scoring and evaluating the responses received for the above referenced project, enclosed for your grading, scoring and evaluation task is the following;

Hidalgo County Purchasing Department received Proposals (RFP's) on Wednesday, September 03, 2014 for the above mentioned project. Three (3) responses were received and a copy of each is attached.

In accordance with the County Purchasing Act, the above-referenced project was issued as a competitive proposal (RFP) and, therefore, all information contained in the response(s) is to be kept **CONFIDENTIAL** until award and final approval of contract by Hidalgo County Commissioner's Court.

Until that time, and due to the confidential nature of these proposals, **no discussion of these proposals shall occur with anyone outside the Purchasing Department for questions, clarifications, information or guidance.** The RFP Packet with ALL of its contents cannot not be reproduced for any reason and must be returned to Buyer in its entirety (including the grading/scoring sheets) after the evaluation is complete.

The entire procurement packet is included so that you can review the project and the evaluation criteria that will be utilized to determine which firm submitted the most responsible and best value proposals. **PLEASE BE ADVISED AND INSTRUCTED THAT THE SCORING, GRADING AND EVALUATING OF EACH RESPONSE IS TO BE COMPLETED INDIVIDUALLY and PRIVATELY.** The following protocol is to be utilized for purposes of evaluating all proposals;

- o Review the RFP and become thoroughly familiar with the solicitation request/packet;
- o Review the Evaluation Form to be familiar with the Criteria that is listed;
- o Review the proposals making notes as you go relative to how well they meet the evaluation criteria;
- o Scoring Sheets are provided. Please make any notations necessary to document your scores.
- o Evaluate each firm against the criteria, not each other.
- o Scores are given up to the percentage available in the category.
- o The evaluation consists of a total of one hundred (100) point scoring system with 100 points being the best.

After completing your evaluation, All documentation including responses and evaluation forms must be returned by no later than **1:30 p.m., Friday, September 19, 2014.**

I understand the above information and instruction and agree to not reveal any content of any proposal to anyone. I will not discuss any details, contents or aspects of the responses. I will report any vendor contact concerning this evaluation process or any undue influence on my evaluation of proposal to the responsible buyer at the Purchasing Department. Any committee member may request a "joint meeting of the members" if felt that it is warranted and necessary.

**Please sign below and acknowledge that you have read the instructions and will honor all the aspects of your most important task including the Confidentiality clause. Thereafter, return said memorandum (via email) to: [yolanda.velasquez@co.hidalgo.tx.us](mailto:yolanda.velasquez@co.hidalgo.tx.us) or fax (956) 318-2629.**

**Thank you for your cooperation in this important matter.**

Signature: Stephanie Palacios

Date: 9/19/14

Printed Name: Stephanie Palacios

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>                         | <u>Range</u> | <u>Point Score</u> |
|----|---|--------------|--------------------|
| 1. | <b>Understanding the Services/Methodology</b>     | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 2. | <b>Ability to Commit to all Services Required</b> | 30 points    | <u>30</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 3. | <b>Ease of Support System &amp; Response Time</b> | 20 points    | <u>20</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 4. | <b>Cost Fees and Warranty</b>                     | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
|    | <b>Total Score</b>                                | <u>95%</u>   | <b>100%</b>        |

Provider: KoFile Systems

Evaluator: Stephanie Palacios

Date: 9/19/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>                         | <u>Range</u> | <u>Point Score</u> |
|----|---|--------------|--------------------|
| 1. | <b>Understanding the Services/Methodology</b>     | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 2. | <b>Ability to Commit to all Services Required</b> | 30 points    | <u>15</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 3. | <b>Ease of Support System &amp; Response Time</b> | 20 points    | <u>10</u>          |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
| 4. | <b>Cost Fees and Warranty</b>                     | 25 points    | <u>0</u>           |
|    | Comments/Rationale for Points: _____<br>_____     |              |                    |
|    | <b>Total Score</b>                                | <u>45%</u>   | <b>100%</b>        |

Provider: Property info

Evaluator: Stephanie Palucci

Date: 9/19/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

| <u>Selection Criteria</u>                            | <u>Range</u> | <u>Point Score</u> |
|--|--------------|--------------------|
| 1. <b>Understanding the Services/Methodology</b>     | 25 points    | <u>20</u>          |
| Comments/Rationale for Points: _____<br>_____        |              |                    |
| 2. <b>Ability to Commit to all Services Required</b> | 30 points    | <u>15</u>          |
| Comments/Rationale for Points: _____<br>_____        |              |                    |
| 3. <b>Ease of Support System &amp; Response Time</b> | 20 points    | <u>10</u>          |
| Comments/Rationale for Points: _____<br>_____        |              |                    |
| 4. <b>Cost Fees and Warranty</b>                     | 25 points    | <u>20</u>          |
| Comments/Rationale for Points: _____<br>_____        |              |                    |
| <b>Total Score</b>                                   | <u>65%</u>   | 100%               |

Provider: Xerox

Evaluator: Stephanie Palucin

Date: 9/19/14



# MEMORANDUM

(IMMEDIATE REVIEW AND RESPONSE REQUIRED)

#5

2812 SOUTH BUSINESS HIGHWAY 281 ★ EDINBURG, TEXAS 78539★TEL: (956) 318-2626 ★ FAX: (956) 318-2629

**TO:** All Members of Evaluation Committee  
Proposal Evaluation Committee Team Member

**FROM:** Yolanda Velasquez, Buyer II, Hidalgo County Purchasing Department

**DATE:** September 09, 2014

**SUBJECT:** Request for Proposals (RFP) "Records Management & Document Imaging Process" 2014-286-09-03-YZV

Evaluation Committee members who will be grading, scoring and evaluating the responses received for the above referenced project, enclosed for your grading, scoring and evaluation task is the following;

Hidalgo County Purchasing Department received Proposals (RFP's) on Wednesday, September 03, 2014 for the above mentioned project. Three (3) responses were received and a copy of each is attached.

In accordance with the County Purchasing Act, the above-referenced project was issued as a competitive proposal (RFP) and, therefore, all information contained in the response(s) is to be kept **CONFIDENTIAL** until award and final approval of contract by Hidalgo County Commissioner's Court.

Until that time, and due to the confidential nature of these proposals, **no discussion of these proposals shall occur with anyone outside the Purchasing Department for questions, clarifications, information or guidance.** The RFP Packet with ALL of its contents cannot not be reproduced for any reason and must be returned to Buyer in its entirety (including the grading/scoring sheets) after the evaluation is complete.

The entire procurement packet is included so that you can review the project and the evaluation criteria that will be utilized to determine which firm submitted the most responsible and best value proposals. **PLEASE BE ADVISED AND INSTRUCTED THAT THE SCORING, GRADING AND EVALUATING OF EACH RESPONSE IS TO BE COMPLETED INDIVIDUALLY and PRIVATELY.** The following protocol is to be utilized for purposes of evaluating all proposals;


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- o Review the Evaluation Form to be familiar with the Criteria that is listed;
- o Review the proposals making notes as you go relative to how well they meet the evaluation criteria;
- o Scoring Sheets are provided. Please make any notations necessary to document your scores.
- o Evaluate each firm against the criteria, not each other.
- o Scores are given up to the percentage available in the category.
- o The evaluation consists of a total of one hundred (100) point scoring system with 100 points being the best.

After completing your evaluation, All documentation including responses and evaluation forms must be returned by no later than **1:30 p.m., Friday, September 19, 2014.**

I understand the above information and instruction and agree to not reveal any content of any proposal to anyone. I will not discuss any details, contents or aspects of the responses. I will report any vendor contact concerning this evaluation process or any undue influence on my evaluation of proposal to the responsible buyer at the Purchasing Department. Any committee member may request a "joint meeting of the members" if felt that it is warranted and necessary.

**Please sign below and acknowledge that you have read the instructions and will honor all the aspects of your most important task including the Confidentiality clause. Thereafter, return said memorandum (via email) to: [yolanda.velasquez@co.hidalgo.tx.us](mailto:yolanda.velasquez@co.hidalgo.tx.us) or fax (956) 318-2629.**

Thank you for your cooperation in this important matter.

Signature:   
Printed Name: Renia Rouse 9/19/2014

Date: 9/19/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | Understanding the Services/Methodology   | 25 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Good understanding of service needs. Overall scope of project.</u> |              |                    |
| 2. | Ability to Commit to all Services Required   | 30 points    | <u>25</u>          |
|    | Comments/Rationale for Points: <u>Met all the criteria.</u>  |              |                    |
| 3. | Ease of Support System & Response Time   | 20 points    | <u>24</u>          |
|    | Comments/Rationale for Points: <u>Answered the criteria correctly.</u>                               |              |                    |
| 4. | Cost Fees and Warranty   | 25 points    | <u>24</u>          |
|    | Comments/Rationale for Points: <u>Fair Value</u>   |              |                    |
|    | <b>Total Score</b>   | <u>98</u>    | 100%               |

Provider: KOFIL

Evaluator: Penia Ramirez

Date: 9/11/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

**RFP EVALUATION FORM**

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | Understanding the Services/Methodology   | 25 points    | <u>21</u>          |
|    | Comments/Rationale for Points: <u>Does not demonstrate full understanding of scope of work.</u>            |              |                    |
| 2. | Ability to Commit to all Services Required   | 30 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Couldnt meet all the indicated criteria. Consumables couldnt be met.</u> |              |                    |
| 3. | Ease of Support System & Response Time   | 20 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>Satisfactory.</u>  |              |                    |
| 4. | Cost Fees and Warranty   | 25 points    | <u>20</u>          |
|    | Comments/Rationale for Points: <u>High pricing</u>   |              |                    |
|    | <b>Total Score</b>   | <u>81</u>    | 100%               |

Provider: Property Info

Evaluator: Kevin Ramirez

Date: 9/19/14

**HIDALGO COUNTY CLERK'S OFFICE**  
**"RECORDS, MANAGEMENT & DOCUMENT IMAGING PROCESS"**  
**RFP NO: 2014-286-09-03-YZV**

RFP EVALUATION FORM

|    | <u>Selection Criteria</u>  | <u>Range</u> | <u>Point Score</u> |
|----|--|--------------|--------------------|
| 1. | Understanding the Services/Methodology   | 25 points    | <u>19</u>          |
|    | Comments/Rationale for Points: <u>Did not demonstrate a full understanding of the scope.</u>                     |              |                    |
| 2. | Ability to Commit to all Services Required   | 30 points    | <u>18</u>          |
|    | Comments/Rationale for Points: <u>Did not demonstrate a commitment to provide all the services as requested.</u> |              |                    |
| 3. | Ease of Support System & Response Time   | 20 points    | <u>19</u>          |
|    | Comments/Rationale for Points: <u>Satisfactory.</u>  |              |                    |
| 4. | Cost Fees and Warranty   | 25 points    | <u>24</u>          |
|    | Comments/Rationale for Points: <u>Satisfactory</u>   |              |                    |
|    | <b>Total Score</b>   | <u>80</u>    | 100%               |

Provider: Xerox

Evaluator: Reva Renteria

Date: 9/19/14