

**PHARR - SAN JUAN - ALAMO I.S.D.**  
**REQUEST FOR PROPOSALS (RFP'S) FOR DOCUMENT MANAGEMENT SYSTEM # 18-19-048**  
**RFP OPENING: APRIL 15, 2019 @ 2:30 P.M.**

| PSJA ISD Product Evaluation Matrix: Document Management System |  |                          |                                      |                          |  |                   |
|--|--|--------------------------|--------------------------------------|--------------------------|--|-------------------|
|  |  | Caso Document Management | DocuNav Solutions (VP Imaging, Inc.) | Harvest Technology Group | Precision Micrographics & Imaging , Inc. | YellowFolder, LLC |
|  | Years in Business                                | 24                       | 22                                   | 20                       | 32                                       | 5                 |
|  | Number of Employees                              | 75                       | 20                                   | 15                       | 15                                       | 49                |
|  | Reference Checks                                 |                          | Yes                                  | Yes                      |  |                   |
| Features   | Features - Standard                              | 131                      | 164                                  | 128                      | 0  | 101               |
|  | Features - Optional                              | 22                       | 1                                    | 33                       | 0  | 6                 |
|  | Features - N/A                                   | 12                       | 0                                    | 4                        | 0  | 58                |
|  | Features - No Response                           | 8                        | 8                                    | 8                        | 0  | 8                 |
|  | Features Match                                   | 75.7%                    | 94.8%                                | 74.0%                    | 0.0%                                     | 58.4%             |
| Price  | Price 1 Year                                     | \$265,189                | \$278,705                            | \$213,151                | \$75,990                                 | \$98,820          |
|  | Price 3 Year                                     | \$795,567                | \$426,965                            | \$481,303                | No response.                             | \$296,460         |
|  | Price 5 Year                                     | \$1,325,945              | \$575,224                            | \$749,455                | No response.                             | \$494,100         |
|  | Price 7 Year                                     | \$1,856,323              | \$723,484                            | \$1,017,607              | No response.                             | \$691,740         |
| Rubric   | Company's cost and time proposal (25 Points Max) | 5                        | 10                                   | 12                       | 0  | 25                |
|  | Professionalism of the proposal (5 Points Max)   | 2                        | 4                                    | 4                        | 0  | 4                 |
|  | System Features (25 Points Max)                  | 19                       | 24                                   | 18                       | 0  | 10                |
|  | Qualifications and experience (15 Points Max)    | 15                       | 14                                   | 13                       | 0  | 3                 |
|  | Proposed methodologies (5 Points Max)            | 0                        | 5                                    | 0                        | 0  | 0                 |
|  | Managerial and staff capability (10 Points Max)  | 10                       | 3                                    | 2                        | 0  | 7                 |
|  | School District experience (15 Points Max)       | 5                        | 15                                   | 15                       | 0  | 10                |
|  | <b>Total Points: 100</b>                         | <b>56</b>                | <b>75</b>                            | <b>64</b>                | <b>0</b>                                 | <b>59</b>         |

**Notes:** Caso Document Management was deducted 5 points from Company's cost and time proposal for not providing pricing for hosted solution and conversion.  
Precision Micrographics & Imaging , Inc. did not bid on the document management system; the vendor only bid on the document scanning services.  
YellowFolder was deducted 5 points from System Features for not having the workflow functionality.

**Recommendation:** We recommend DocuNav Solutions (VP Imaging, Inc.) - Laserfiche based on the product rating, vendor viability, and annual costs.

**TAKEN TO BOARD BOARD OF EDUCATION / MAY 27, 2019**

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|                                  |                     |
|----------------------------------|---------------------|
| <b>DocuNav - Hosted Solution</b> | \$211,024.99        |
| <b>Conversion</b>                | \$67,680.00         |
| <br>                             |                     |
| <b>Total First Year</b>          | <b>\$278,704.99</b> |
| Year 2                           | \$74,129.79         |
| Year 3                           | \$74,129.79         |
| Year 4                           | \$74,129.79         |
| Year 5                           | \$74,129.79         |
| <br>                             |                     |
| <b>Total After 5 Years</b>       | <b>\$575,224.15</b> |

|               | <b>Total Costs</b> |
|---------------|--------------------|
| <b>Year 1</b> | \$278,705          |
| <b>Year 3</b> | \$426,965          |
| <b>Year 5</b> | \$575,224          |
| <b>Year 7</b> | \$723,484          |

DocuNav Solutions is a North Texas-based provider of Laserfiche ECM Software. With over 22 years of experience implementing and supporting electronic document and records management solutions, DocuNav has helped organizations across several different industries eliminate paper record storage and automate business processes. From K-12 Education and Municipal Government, to Private Business and Non-Profit Organizations, DocuNav Solutions has the knowledge and experience to help ensure the successful implementation of Laserfiche ECM solutions. Our customers are using our solutions for automating business processes, streamlining approvals, ensuring compliance with record keeping mandates, and more. Helping K-12 Education customers implement Laserfiche ECM (document management systems) is our primary focus. We currently support 50% of the largest school districts in Texas (75k+ students) and over 30% of all districts of 10k students or more.

|                              |            |
|------------------------------|------------|
| <b>Years in Business:</b>    | <b>22</b>  |
| <b>Personnel:</b>            | <b>20</b>  |
| <b>Listing of References</b> | <b>Yes</b> |