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Fremont County Request for Proposals Document Digitization

January 16, 2023 at 2:00pm MST

PREPARED FOR:

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Grants Manager
Fremont County
615 Macon Avenue, Room 106
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1. COVER LETTER

January 16, 2023

Rachel Miller
Grants Manager
Fremont County
615 Macon Avenue, Room 106
Cañon City, CO 81212
719-276-7356
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Dear Ms. Miller,

Thank you for the opportunity to submit a response proposal for Fremont County's Document Digitization RFP. We believe DocuTek would be a great fit for this project, for the following reasons:

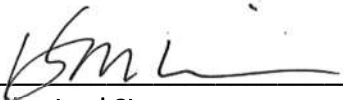
- 27 years of experience scanning documents to electronic format
- Key Staff Members have CJIS training for handling sensitive records.
- Extensive experience scanning all types of paper and microfilm-based records.
- We have digitized these types of records for many state, county and municipal entities, including: Adams County Sheriff's Department, City and County of Broomfield, Town of Castle Rock, Colorado Springs School District 11, City of Englewood, City of Greeley, Jefferson County Public Schools, Town of Windsor, Wyoming Department of Environmental Quality, and many others.
- Excellent security controls and processes for handling confidential records.
- Experienced, highly trained, trusted, and competent production staff.
- Best customer service and communication throughout the scanning process.
- In-house service technician to ensure equipment is running to manufacturer specifications and regular preventive maintenance is performed.
- State-of-the-art Canon document scanners
- 100% customer satisfaction guarantee.

DocuTek has been in business since 1995. We have successfully completed numerous record scanning projects with similar specifications, as your project. DocuTek has scanned over 70 million pages to digital images, including small format documents, large format documents, microfilm, microfiche, and aperture cards. DocuTek is a local business with a laser focus for converting paper and microfilm-based records. This is all we do, and we do it well, since our company was formed over 27 years ago.

Ken Voiles is the primary point of contact. Ken is a Managing Owner at DocuTek, Inc. DocuTek has one office, located at 750 W. Hampden Ave. Suite L-105 Englewood, CO 80110.

Please see the following pages on how our service offerings will meet or exceed your expectations. Our services are guaranteed to meet your satisfaction 100%. We look forward to the opportunity of proving how the “sum of all our parts” at DocuTek will provide Fremont County with the best partner for this project.

Kenneth M. Voiles
Managing Owner
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750 W. Hampden Ave., L-105
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kenvoiles@edocutek.com



Authorized Signature

01/16/2023
Date

2. DOCUTEK PROFILE

DocuTek's focus since the early beginnings of our company has been providing the best document scanning services to government entities, public companies, and private companies with large amounts of paper documents. We have developed proven approaches to adapt to virtually any scanning project, while maintaining tight quality controls and procedures for a high-quality deliverable product.

DocuTek is locally owned and operated. We have one location. We provide scanning services for all points in Colorado, Wyoming and the Rocky Mountain Region. Our production staff fluctuates between 20-25 operators. DocuTek is located at 750 W Hampden Ave. Suite L-105 Englewood, CO 80110. We are in a highly secure building with card key access and 24/7 video monitoring on the exterior of the building, all entry points, and common areas throughout the building. DocuTek has card key access into our office space. Boxes of records we scan for clients are further secured with a padlocked chain link fence within our office space. All boxes will be stored in a climate-controlled storage area within DocuTek.

DocuTek will create a Production Team to only work on Fremont County records. We anticipate assigning two full-time Document Preparation Specialists, two full-time Document Scanning Specialists, one full-time Quality Control Specialist, and a Project Manager to manage all steps of the conversion. Having the same Staff work on the project will ensure consistency and allow the team to focus on a single task at hand. From our experience, this is key to a successful document conversion projects. A daily staff meeting with the team keeps everyone on the same page and engaged on meeting project goals.

All DocuTek Staff members are trained from beginning to end on all phases of a scanning project, as deliverables can be different for each project. Understanding the overall goals of the project is a key ingredient for project success. This helps each team member on a project know what we are delivering to the client. Staff members for this project will have at least 2 years of tenure with DocuTek.

Jay Hoagland will be the Project Manager. He would oversee the Operational staff, day-to-day processing, and ensure the team is meeting project targets and goals. Sandra Romero is the Quality Control Supervisor who will review 100% of scanned images. Millie MacLeod and Stephanie Weigand will be the assigned Document Scanning Specialists. Anna Pacheco and Larry Jefferson will be the Document Preparation Specialists. These document conversion professionals have over 60 years combined experience.

DocuTek has no pending complaints nor is under any type of litigation. We have an excellent track record with our clients and have consistently delivered on project goals and deadlines. Our company is in good standing with the Colorado Secretary of State.

3. DETAILED SCOPE/SPECIFICATION REQUIREMENTS

Fremont County has a variety of archival records in different departments. Records types include small format documents (up to 11" x 17"), large format documents (over 11" x 17"), and bound books.

The DocuTek Project Manager would work with representatives from each department to identify the documents to be scanned and develop the file indexing/naming schema that would best facilitate retrieval of the digitized images. In most cases, this is usually a matter of mimicking digitally the filing system currently being used for the analog hard copies. But, in some instances, our many years of experience digitizing a wide variety of document types can allow us to make recommendations to improve and/or simplify the digital filing methodology.

DocuTek recommends 300 dpi for the scanning of paper documents. This dpi is "ideal" for OCR (Optical Character Recognition), provides good quality images without picking up unwanted/background noise, and provides a good/readable quality image if information is not all typewritten, and keeps file sizes manageable. In general, we have found that scanning all documents in color mode is best for ensuring that image legibility is equal to or even better than the originals.

Though specific methodologies may be designed for each department, below is an outline of the overall general methodology we employ for most projects.

Secure Pickup & Transportation

1. Sign any required documentation, contracts, or NDA's prior to scheduling a document pickups.
2. If possible, DocuTek would prefer to pick up most or all of the documents at the same time, but we can work each department to develop a pickup schedule most conducive to the department's workflow.
3. Boxes of documents will be transported by DocuTek employees in company owned vehicles for full chain of custody.
4. Boxes will be picked up and transported directly to our Englewood, CO scanning facility, with no other side stops or pickups.
5. Boxes will be unloaded in a covered loading dock area and physically monitored by DocuTek Staff as these are transported into our internal climate-controlled storage area.
6. No one outside of DocuTek will be able to access these documents because of the secure storage area.
7. Access to records will only be available to DocuTek employees, with no exposure to any other people outside of our company.

Inventory and Tracking

1. Boxes will be assigned a box number and labeled for tracking purposes.
2. Boxes will be entered into our tracking system for managing the boxes.
3. Documents can be requested by authorized Fremont County staff, while in possession of DocuTek. Upon request, DocuTek staff will locate the document, scan the paper file, and upload the scanned electronic file to a secure DocuTek FTP site within one business day or less.

Document Preparation and Scanning Process

1. DocuTek will test scan one box per department as a pilot and deliver to Fremont County for inspection and approval.
2. Upon completion and acceptance of the sample test boxes, the Project Team will be trained on the details, requirements, and deliverables.
3. DocuTek will use a dedicated Project Team that will consist of 2 Document Preparation Specialists and 2 Document Scanning Technicians, 1 Quality Control Staff Member to perform day-to-day scanning.
4. All DocuTek Staff working on this project will be Full-Time employees. A project overview will be done to identify project conversion requirements, goals, and deadlines.
5. Small format documents will then be moved (one box at a time) to our Document Preparation Services Department for preparation prior to scanning.
6. Documents will come "Prepped/Scan Ready" with staples and paper clips removed.
7. If scanning questions arise, such as poor-quality documents/indexing requirements, DocuTek Project Manager will contact Fremont County for resolution.
8. Indexing will vary by department and will be developed by the Project Manager and Fremont County staff. For the purposes of this RFP, pricing in section 4 below includes up to three indexes fields per document type/department.
9. If Fremont County is able to provide a data file containing indexing information contained in an existing database, this would be utilized.
10. If feasible, bar codes will be used to help prevent data entry errors.
11. Boxes will then be moved one at a time to our Scanning Department. Files will be scanned and remain in the exact order in which they were received.
12. Small format scanning will be performed on Canon high speed document scanners. Large format documents will be scanned on Context scanners. Bound books, fragile documents and any other documents that require special handling will be scanned on a Bookeye 4 scanner.
13. All documents will be scanned to a multipage, searchable PDF format.
14. Simplex and duplex pages will be scanned accordingly, and blank pages will be dropped and not charged for. This process is done through a feature in our scanning software called "skip blank page."
15. Once all files are scanned, the box will be returned to the storage shelving area.

Indexing and QA (Quality Assurance) Process

1. Indexing will be done either via hand key data entry or, where feasible, via barcode recognition.
2. 1st step QA/QC happens at the time of scanning. Each page is visually displayed on the computer monitor as it is scanned. 100% of images are viewed at the time of scanning.
3. 2nd step QA/QC, 100% of scanned images will then be reviewed daily by the assigned QC (Quality Control) Staff member. QC Review Supervisors are independent of Scanning Technicians, so that a different set of eyes are used in reviewing scanned images. File naming accuracy is also checked in this QC stage.
4. As a third and final Quality Control check, the Project Manager will then review up to 50% of scanned images/index data to ensure accuracy.
5. All scanned images will be run through an OCR engine to create searchable PDFs.

Delivery and Final Disposition

1. The digitized files can be delivered to Fremont County either via secure FTP or encrypted USB hard drives.
2. We anticipate processing 20-25 boxes per week and 4 months for overall project completion.
3. Once the digitized files have been delivered to Fremont County and checked by department staff, they will be permanently deleted from DocuTek encrypted hard drives.
4. Documents will either be returned to Fremont County or destroyed via secure document shredding.
5. If boxes are to be shred, DocuTek will store boxes for up to 3 months after delivery, to receive approval for shredding.

Quality Control

Document image quality, insuring all documents have been scanned, accuracy of naming, and attention to detail are the highest priorities when it comes to scanning documents for our customers.

- ✓ *Image Quality.* The Canon document scanners and software we use have customizable settings to establish “user preferences” for scanning different types of documents. Some of the image control settings include: auto or manual image darkness control, DPI, auto or manual image contrast, auto page size detection, front and back side brightness controls, front and back side contrast controls, border removal, remove background, deskew, color drop out, text orientation, and bleed through prevention.

- ✓ *Ensuring All Documents Scanned.* The Canon document scanners are equipped with three features that insure all documents are scanned. The first feature is “double feed detection by ultrasonic.” When this feature is used, the scanner detects if more than one page is being pulled through the scanner. If two pages are pulled through, the scanner will stop and require operator intervention. The second safety measure feature with the Canon scanners is the way the feed rollers pull documents through the scanner. Upper and lower rollers separate the pages by turning clockwise and counterclockwise. This unique turning action does an excellent job of separating pages one at a time for scanning into the Automatic Document Feeder. The third double feed detection characteristic of the Canon scanners is the “detect by length” feature. This is the least commonly used, however is effective when page lengths are all the same size. With this feature turned on, pages with varying lengths will cause the scanner to stop and require operator intervention.
- ✓ *Accuracy of Indexing.* Bar codes will be used for indexing/file naming, if possible. If not, indexing/file naming will occur “post scan” using PaperVision indexing software.
- ✓ *Attention to Detail.* One of the main characteristics we look for when hiring employees for the Scanning Department is attention to detail. We understand the importance of insuring you receive an exact replica of the paper copies in a digital form. Scanner Operators typically are required to work a minimum of 6 months before they can scan production documents for our customers. New hires usually start in our Document Preparation Department so that they can become familiar with preparing documents correctly, before eventually moving into the Scanning Department.

Listed below are some important facets of our company that we believe make DocuTek uniquely qualified and capable of completing the imaging portion of this project for Fremont County Sheriff:

- **BEST PRACTICES DOCUMENT SCANNING PROCESS.** DocuTek, Inc. has been using the Canon document scanners for over 27 years, which offer arguably the best quality scans of any scanner manufacturer. We have preset scanner settings, so that every scanner used on a project delivers the same results. The combination of hardware, software, and our unique scanning process (removing all pages from box, scanning each page/file, returning to box after scanning) insure all paper is scanned with the highest legibility possible. Guidelines created following CDIA best practices.
- **OWNERSHIP AND STAFF EXPERIENCE.** The two owners have over 50+ years of experience, with primary roles of Technical Expertise and Project Management. Key personnel that would be involved with your project have almost **100 years combined experience** working in document conversion service bureaus. During our 27 years in business, we have scanned millions of images from paper and microfilm.

- **CONFIDENTIALITY.** DocuTek full-time employees have a **background check** and sign a **non-disclosure agreement** as a term of employment. Key employees currently have **CJIS training and certification, which entails the confidential handling of police records.**
- **SECURITY.** DocuTek has successfully completed many projects with highly sensitive and confidential information, including state income tax returns, medical records, police department case files, human resources files, and various financial and legal records. **All documents to be scanned at our facility will be transported by DocuTek authorized personnel in one of our company vehicles to ensure proper chain of custody. No third-party transportation will be utilized.** Once at our secured facility, records will be stored in secured area, accessible only to authorized employees. All entry points to the DocuTek office are secured by card key access only. Only DocuTek employees have card keys. Visitors are allowed entry into our office by ringing a bell located at the main entrance. Visitors are escorted at all times while visiting our office. The office building, we are located in is also monitored by 24/7 surveillance cameras at all entrances and various hallways throughout the building. Another level of security for our office is the main entrances into our office building. Main door entrances into the building are open 7am – 8pm (M-F), while automatically locking during even hours and weekends.
- **CUSTOMER SERVICE.** Client satisfaction is our first priority, and our customer service is second to none. We are very responsive to any needs of our clients and are able to quickly implement changes as necessary. Through the course of the project, DocuTek will provide regular updates to the appropriate Staff to ensure we are on task and on time.
- **SCANNING EQUIPMENT AVAILABILITY AND RELIABILITY.** All servicing of our equipment is done “in house”. Our Service Technicians are available to remedy hardware and software issues immediately. This minimizes down time by having onsite Service Technicians who can quickly resolve any issues and lowers our cost of doing business by not having to pay 3rd party companies. Additionally, this further protects our client’s confidential records by minimizing or eliminating the need for non-authorized personnel entering work areas.
- **FOCUS.** Document scanning, microfilming scanning, sales/service of scanner equipment and the design, installation and support of electronic document management systems software is *all we do*. It is not just our primary line of business; it is **our only line of business**. We don’t sell copiers or printers or any other business ventures outside of document scanning and document management.

4. COST PROPOSAL

OFFSITE DOCUMENT SCANNING COST PROPOSAL		
DESCRIPTION	UNIT	COST
Small Format (11" x 17" or less) preparation & scanning to PDF, up to three index fields, OCR (optical character recognition) for full text searching, 3 Step Quality Control Process	Per Image	\$0.075
Large Format (greater than 11"x 17"), Scanning to PDF by set or map, Document Preparation, up to three index fields, OCR, 3 Step Quality Control Process, inserting of large format images into main file (as needed)	Per Image	\$1.25
Bound Books/Flatbed Scanning PDF, OCR, up to three index fields, OCR, 3 step Quality Control Process, Applies to both bound books and other fragile documents that require delicate handling	Per Image	\$0.45
Document Transportation for Scanning to DocuTek facility in batches, by department, or all at once	Per Trip	\$750.00
Document Boxing provide boxes and box documents on shelves or in file cabinets (<i>optional</i>)	Per Box	\$5.00
Secure Document Shredding (<i>optional</i>)	Per Box	\$6.50