

**Approved**

**REQUEST FOR AGENDA PLACEMENT FORM**

**Submission Deadline - Tuesday, 12:00 PM before Court Dates**

**SUBMITTED BY: Ralph McBroom**  
**TODAY'S DATE: June 25, 2019**

**DEPARTMENT: Purchasing**

**DEPARTMENT HEAD: Ralph McBroom**

**REQUESTED AGENDA DATE: July 8, 2019**

**SPECIFIC AGENDA WORDING: Consideration and approval of purchase of Vanguard Records Management & Imaging System from Kofile Preservation for the County Clerk. The purchase will be made under the General Service Administration (GSA) Contract Number GS-35F-275AA and will be for a total of \$250,000 the first year and \$47,850.80 annually for the second year through the fifth year.**

**PERSON(S) TO PRESENT ITEM: Ralph McBroom C.P.M.**

**SUPPORT MATERIAL: (SEE ATTACHED)**

<b>TIME: 5 min</b>	<b>ACTION ITEM: X</b>
<small>(Anticipated number of minutes needed to discuss item)</small>	<b>WORKSHOP</b>
	<b>CONSENT:</b>
	<b>EXECUTIVE:</b>

**STAFF NOTICE:**

**COUNTY ATTORNEY: X**  
**AUDITOR:**  
**PERSONNEL:**  
**BUDGET COORDINATOR:**

**IT DEPARTMENT:**  
**PURCHASING DEPARTMENT:**  
**PUBLIC WORKS:**  
**OTHER: County Clerk**

**\*\*\*\*\*This Section to be completed by County Judge's Office\*\*\*\*\***

ASSIGNED AGENDA DATE: \_\_\_\_\_

REQUEST RECEIVED BY COUNTY JUDGE'S OFFICE \_\_\_\_\_

COURT MEMBER APPROVAL \_\_\_\_\_ Date \_\_\_\_\_

# Kofile

HONORABLE BECKY IVEY  
JOHNSON COUNTY CLERK

AGREEMENT FOR  
VANGUARD RECORDS MANAGEMENT & IMAGING SYSTEM  
(ANNUAL SUPPORT & MAINTENANCE PACKAGE)

APRIL 29, 2019

# TABLE OF CONTENTS

WHO IS KOFILE .....	1
SOLUTION HIGHLIGHTS.....	2
SOLUTION FEATURES .....	3
User Interface .....	3
Services Included in the Agreement .....	5
Optical Character Recognition (OCR) Search .....	5
Future Development Features .....	6
Touchable & Clickable Indexing .....	6
Fraud Alert.....	6
New Search Features .....	6
SOLUTION PROPOSAL .....	7
Price Proposal .....	7
Project Acceptance .....	7
Terms & Conditions .....	8
GSA Schedule 70 Contract Cooperative Purchasing.....	9



## CONTACT INFORMATION

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# WHO IS KOFILE?

Kofile Technologies, Inc. (Kofile) proposes to provide the Johnson County Clerk's Office with *Vanguard Records Management*—a new class of system with a browser-based cloud application. This solution provides:

- Effective and creative use of information technology
- Delivery of world-class service through operational and technical excellence
- A flexible approach to each project and delivered service
- Extraordinary value through customized solutions and cost effective delivery

## UNPARALLELED KNOWLEDGE

Kofile provides a full complement of products and services designed for county offices. Kofile's business solutions also address books and binders, re-indexing, index verification, film to image conversion, complete document indexing, recording, workflow, imaging systems, Internet hosting and data access, and electronic recording. By solving complex system requirements—in a cost effective manner—Kofile helps local government address budgetary pressures that impede them from improving services provided to the public.

The Kofile project team consists of an exclusive collaboration of business experts with unparalleled experience. This team has amassed over 150 years experience with county systems. Kofile currently has system contracts in place in the following Texas counties:

- |                    |                   |                    |
|--------------------|-------------------|--------------------|
| ▪ Hidalgo County   | ▪ Kerr County     | ▪ Nueces County    |
| ▪ Denton County    | ▪ Brazos County   | ▪ Milam County     |
| ▪ Bexar County     | ▪ Starr County    | ▪ Matagorda County |
| ▪ Chambers County  | ▪ Ward County     | ▪ Midland County   |
| ▪ Jim Wells County | ▪ Anderson County | ▪ Walker County    |
| ▪ Grayson County   | ▪ Burleson County |                    |

Kofile has assembled a staff that understands the requirements of local government and listens to its customers. Products and services are specifically tailored to the marketplace. Kofile personnel are pioneers in the concept of fully integrated systems for fee collection, as well as distribution, indexing, electronic recording and the management of all documents filed at a county.

Johnson County can capitalize on Kofile's specialized expertise and support strength.

- With prompt online digital and voice support, Kofile's customers are not subject to response and resolution delays. Technicians respond with the latest automated problem-isolation and resolution tools.
- Kofile has a staff of deployable resources in Dallas, and San Antonio, Edinburg.
- Kofile values ongoing and continuous relationships. User Group meetings/ conferences will be held within the State of Texas.

The logo for Kofile, featuring the word "Kofile" in a bold, sans-serif font with a stylized checkmark or swoosh element to the right of the letter "e".

## SOLUTION HIGHLIGHTS



### ESTABLISHED DOCUMENT PROCESSING & WORKFLOW:

- OCR Documents
- Disaster Recovery is automatically included



### ADVANCED FEATURES & SERVICES:

- Collaborative Document Sharing
- Configurable Workflow Processing
- Online e-Marriage Application and License Generation in-house
- Scheduled Imports & Exports
- Services to/from FTP or Accessible Devices Include:
  - index, import, and export in text or Microsoft® Office formats
  - image, import, and export in single & multi-page TIFF & PDF formats
- Email delivery for Receipts, Copies, and Reports in PDF format
- Customized Reports
- Unlimited online e-forms may include (Kofile does not limit the number of forms that it can design for the County Clerk's Office):
  - Marriages, Births, Deaths, Assumed Names, Certified Copy Requests, Military Discharges, Copy Requests, Marks and Brands



### PUBLIC ACCESS & SERVICES:

- Public Records Research: Online and at designated County locations—index, images, and text
- Web Distribution, e-Commerce, and Account Management
- Kiosk or eForms on Public Workstations—Marriages, Assumed Names, and User-Defined (if included in the County solution)

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# SOLUTION FEATURES

*Vanguard Records Management* is a complete system for Records Recording, Document Management, Public Search, and Customer Service. It was designed and developed to improve user experience. Johnson County will boast a full cloud implementation in which all servers are located off premises. Only user workstations and peripherals are installed in the County Clerk's Office. This simplifies the operational environment while utilizing all of the latest technologies.

Kofile will provide all hardware, system software, application software, and any items such as networking and communication needed to implement *Vanguard Records Management*. This includes image conversion (if applicable), delivery, installation, documentation, maintenance, and user training.

Kofile guarantees that it will deploy the necessary resources to deliver *Vanguard Records Management* without a break in County Clerk operations.

## USER INTERFACE

Since this solution is a browser-based cloud application, its User Interface is standard for browser-based applications.

Additionally, the System is accessible on standard personal computers and tablet devices (e.g. Microsoft® Surface and Apple iPad). Tablet computers or devices can even access *Vanguard Records Management* in any wireless environment.

With this simplified System, the end-user public does not need prolonged intervention or assistance from County employees. Facilitation of public use was given the highest priority during development.

*Vanguard Records Management* user interface is professionally designed to be intuitive and easy-to-use. Features include:

### CONCURRENT FUNCTIONALITY

Whether at home or in the office, a full browser-based solution allows users a uniform web experience— including visual and navigation features.

### INTUITIVE NAVIGATION

Easily transitions from one task to another, or back to the start. The System incorporates 'Google™-style' search capabilities.



## COUNTY STAFF OR PUBLIC USERS

Access the System with your method of choice. Interface is designed for the end-user, and it looks and functions the same regardless of the device:

- touchscreen
- mouse
- keyboard
- touchpad

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SIMPLE COMMANDS	Simple easy to follow "OK" or "Cancel" command buttons with alternate action task links throughout.
CONFIGURABLE	Configure to as much (or little) field-level and task-level help as needed.
CONVERSION/ GO-LIVE	Possible within six months of receiving clean image and index data. The optimal Go-Live start date is negotiated with the County Clerk after Commissioners' Court approval based on available implementation resources and the needs of the County Clerk Office.
REAL-TIME	Reliable, high performance, online, real-time environment.
STAFF & PUBLIC USER TRAINING	Kofile offers an intensive training program on an unlimited basis and training is available at any time.
MAINTENANCE & UPDATES	Kofile is responsible for software updates and performs updates on a scheduled basis, at least twice per year and as required.
RECOVERY & BACK-UPS	Backups are automatic and do not involve County personnel (unless otherwise requested). Backups occur off-site and are managed by Kofile. In addition, as an optional service, the County may also request that a second backup of all County data occurs at a County-designated location.
CUSTOMER SUPPORT	Support staff are located in Dallas at Kofile's Data Center. They are trained to handle any problem type and understand the need to use simple instructions. Support will exceed customer expectations.
	The Johnson County Clerk's support and microfilming services (if purchased) are fulfilled at the Kofile facility located at 6300 Cedar Springs Road, Dallas, TX 75235—see pictured.
	Kofile also has a staff of deployable resources in Dallas, and San Antonio, Edinburg.
FLEXIBLE eRECORDING	Allows for multiple local entities (e.g., title companies, government entities, other county departments) to file directly into the System without third party involvement.





## SERVICES INCLUDED IN THE AGREEMENT

- Helpdesk services for public inquiries regarding hosted data and ecommerce services.
- Kofile provides price quotes for and, if approved, fulfills open records requests and directly invoices the requestor.
- Included in this System's support services cost, the County itself can fulfill open records requests or assign this task directly to Kofile support.

## OPTICAL CHARACTER RECOGNITION (OCR) SEARCH

- OCR processing of all existing historical typescript (typed) Real Property images residing on the current system. These images are processed and loaded to *Vanguard Records Management* allowing keyword searching of these historical records. All existing data conversion and this OCR processing is included in the quoted System pricing at no additional cost.
- Backfile OCR processing is computer processor intensive and, therefore, time consuming. It may require several months after Go-Live for completion. Handwritten records are not effectively recognized by current OCR technology, and are not processed by the OCR engine.

## FUTURE DEVELOPMENT FEATURES

*These features have passed design and are in either development and/or testing.*

### TOUCHABLE & CLICKABLE INDEXING

- Upon document intake, all documents are processed for OCR. Words that appear to meet the County's indexing requirements are highlighted on the scanned image. An indexer can tab through these selected words and use a hot key to assign specific index fields. In addition, a clerk can select an index field and then click/touch the words to appear in the index field in any order. Also, one can select long form text and place it within the field e.g., a lengthy legal description). *Already designed, this function is development.*

### FRAUD ALERT

- This Kofile service will enables constituents to opt into a fraud alert program. At the day's close, any name(s) entered into the System are reviewed. An email is created with a link to any document that matches exactly the name(s) entered by the user. The user can review the document to determine if there is additional actions required. *This function is in design and programing.*

### NEW SEARCH FEATURES

- Multiple search windows open at once.
- Moveable columns.
- User-defined display criteria.
- Integrated QuickLink® Search of Grantor/Grantee Book Indexes optionally linked to corresponding document Images.
- Built-in notepad and abstract creation/export.

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# SOLUTION PROPOSAL

## PRICE PROPOSAL


Kofile provides a simple pricing mechanism. Pricing is "all inclusive." This includes any software—as directed by the County. *Without a signed agreement, all pricing herein is good for 90 days.* Please note that additional licenses or equipment incur additional charges.

- ▶ For the County Clerk's Office and satellite offices, Vanguard Records Management System is extended for a one-time Implementation, Software License (28 Licenses\*), and Support Fee of **\$250,000.00**.
- ▶ To support the project, the County is annually billed a firm fixed price of **\$47,850.80** for Annual Support and Maintenance Services.
- ▶ Internet Hosting Services (based on \$1.00 per retrieval page)  
(50% of all revenues received from this service are rebated to Johnson County Clerk.)

## COUNTY ACCEPTANCE

The Agreement term commences at the first month of Implementation, not the date of the Agreement Execution. Cost are not billed until System Go-Live.

KOFILE TECHNOLOGIES, INC.

  
Signature

CEO  
Title

July 10, 2019  
Date

JOHNSON COUNTY

  
Signature

County Judge  
Title

July 8 2019  
Date

## TERMS & CONDITIONS

- The anticipated start date for Go Live will be determined upon Commissioners Court approval.
- Pricing includes installation, implementation, user training, all data conversion. Pricing also includes OCR for all of the County Clerk Office's historical real property images. Pricing also includes all ongoing software support, and upgrades. The County is responsible for providing hardware, hardware support, and hardware maintenance.
- This Agreement is ongoing for support and maintenance on an annual basis for five years. The annual price for support and maintenance is fixed for the initial five years after the initial installation and setup payment after Go-Live.
- The Agreement term commences at the first month of Implementation, not the date of the Agreement Execution. Cost are not billed until System Go-Live.

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- Either party may terminate the Agreement without penalty per a written notice at least 30 days prior.
- All data and images are the property of Johnson County, and are provided upon request to the County or County-approved recipients.
- The County is responsible for providing sufficient Internet bandwidth to support system functionality. Said bandwidth shall be dedicated for the System at both the main and remote office locations (if applicable).
- **NOTE:** The System provided under this Agreement includes technical information, software programs, equipment, designs, specifications, drawings, documentation, reports, and other materials (individually and collectively "Kofile Intellectual Property," hereby KIP). County understands and agrees that all KIP (including all software upgrades, modifications, and customizations) provided under this Agreement shall at all times remain the property of Kofile. To the extent the System includes third-party software components provided by Kofile as part of the System, such third-party software will be subject to the provisions of the software licenses provided by those third-party software vendors. The provisions of this Section shall survive termination of this Agreement. Kofile hereby grants to County a limited, non-exclusive, non-transferable, revocable license to use the KIP included in the System solely for the internal operations of County, and only during the Term of this Agreement. Kofile represents and warrants that Kofile possesses all rights necessary to effectuate the license set forth in this Section. The license granted under this Section does not include the right to grant sublicenses for the KIP to any third party, including other persons, agencies, or other governmental entities that are not parties to this Agreement. County and its employees and agents will not cause or permit reverse engineering of all or any portion of the KIP; will not distribute, disclose, loan, market, rent, lease, or otherwise transfer to any third party any portion of the KIP without prior written authorization by Kofile; and will not export any Kofile software products in violation of federal export laws or regulations. The provisions of this Section shall survive termination of this Agreement.



**GSA SCHEDULE 70 CONTRACT COOPERATIVE PURCHASING**

**Kofile has a federal cooperative purchasing (CO-OP) contract that extends to local governments: GSA Schedule 70 Contract No. GS-35F-275AA.** Johnson County is eligible for to purchase from it.

Our Schedule 70 CO-OP Contract presents professional information technology labor categories for data conversion & records management services. Other information from GSA literature includes:

- ▶ The Group 70 contract is available for Cooperative Purchasing with local governments at any time, for any reason, using any funds available.
- ▶ It is entirely voluntary.
- ▶ *The eligible vendors are knowledgeable about Cooperative Purchasing. Vendors are prepared to be a GSA customer's primary point of contact. Furthermore, customers are free to enter into a Cooperative Purchasing agreement with any Schedule vendor without involving GSA.*

To purchase from GSA, follow Johnson County's applicable purchasing requirements. When a Purchase Order is issued, it must reference Kofile's **GSA Contract No. GS-35F-275AA**. Kofile reports the sale to GSA (upon payment) and a 0.75% fee is built in the client's quote for the order for the GSA.

*Also, please note that even though our company name changed from Kofile Preservation, Inc. (currently a D.B.A.) to Kofile Technologies, Inc., this is not yet reflected on the GSA Advantage System.*

VANGUARD SERVICES PROVIDED	PART NO.	DESCRIPTION	UNIT PRICE	QTY.	LINE ITEM TOTAL	TOTAL BILLING (FIRM FIXED PRICE)
<b>IMPLEMENTATION &amp; SUPPORT INITIAL FEE (YEAR 1 UPON GO-LIVE)</b>						
28 Software Licenses, Set Up, Installation, Implementation, Training, and Data Conversion	TSC002	Customer Support Specialist/ Business Hours	\$167.15/Hour	230	\$38,444.50	\$250,000.00
	TSC004	Database Administrator	\$183.90 /Hour	76	\$13,976.40	
	TCS009	Project Architect	\$183.95/Hour	48.16037	\$8,859.10	
	TCS010	Project Manager	\$183.95/Hour	500	\$91,975.00	
	TCS011	Software Programmer	\$208.80 /Hour	200	\$41,760.00	
	TCS014	Trainer	\$157.10/Hour	350	\$54,985.00	
<b>ANNUAL SERVICES SUPPORT (YEARS 2-5)</b>						
Ongoing Software Support & Upgrades	TSC002	Customer Support Specialist/ Business Hours	\$167.15/Hour	286.2746	\$47,850.80	\$47,850.80*

\*Firm Fixed Price (Billing will not exceed Annual Services Support agreed upon regardless of the actual Support & Maintenance Hours required).

