



Enterprise Content Management Solutions
Executive Summary

Lead Agency: Region 4 Education Service Center **Solicitation:** 18-05
RFP Issued: March 29, 2018 **Pre-Proposal Date:** N/A
Response Due Date: May 17, 2018 **Proposals Received:** 8
Awarded to: Companion Data Services, LLC

Region 4 Education Service Center issued RFP 18-05 on March 29, 2018, to establish a national cooperative contract for Enterprise Content Management Solutions.

The solicitation included cooperative purchasing language in Section A. Introduction, I. Background and Region 4 Education Service Center. It states:

“Region 4 Education Service Center (“Region 4 ESC” herein “Lead Public Agency”) on behalf of itself and all state, local governments, school districts, and higher education institutions in the United States of America, and other governmental agencies and non-profit organizations (herein “Participating Agencies”) solicits proposal from qualified Offerors to enter into a Vendor Contract (“Contract”) for the goods or services solicited in this proposal.”

“Contracts are approved and awarded by a single governmental entity, Region 4 ESC, and are only available for use and benefit of all entities complying with state procurement laws and regulations (public and private schools, colleges and universities, cities, counties, non-profits, and all governmental entities). These types of contracts are commonly referred to as being “piggybackable.”

“Region 4 ESC’s purchasing cooperative was established in 1997 to increase their economic and operational efficiency. The purchasing cooperative has since evolved into a National Cooperative used to assist other government and public entities increase their economical and operational efficiency when procuring goods and services.”

Notice of the solicitation was sent to potential offerors, as well as advertised in the following:

- Region 4 website
- National IPA website
- USA Today, nationwide
- Arizona Business Gazette, AZ
- San Bernardino Sun, CA
- Honolulu Star-Advertiser, HI
- The Advocate – New Orleans, LA
- New Jersey Herald, NJ
- Times Union, NY
- Daily Journal of Commerce, OR
- The State, SC
- Houston Community Newspapers, Cy Creek Mirror, TX
- Deseret News, UT
- Richmond Times, VA
- Seattle Daily Journal of Commerce, WA
- Helena Independent Record, MT

On May 17, 2018 proposals were received from the following offerors:

- Active Internet Technologies; dba FinalSite
- Companion Data Services, LLC
- Hyland Software, Inc.
- HumanWare USA Inc.
- MCCI, LLC.
- vCloud Tech Inc.
- Virtual Intelligence Providers, LLC
- West Interactive Services Corporation
- X-IO Technologies

The proposals were evaluated by an evaluation committee. Using the evaluation criteria established in the RFP, the committee elected to enter into negotiations with Companion Data Services, LLC and proceeding with contract award upon successful completion of negotiations.

Region 4 ESC, National IPA and Companion Data Services, LLC successfully negotiated a contract and the Region 4 Board of Directors executed the agreement with a contract effective date of October 1, 2018.

Contract not available in New Jersey

Contract Highlights:

Companion Data Services (CDS) is an independent licensee of the Blue Cross Blue Shield Association providing the award-winning DocFinity software solution, an ECM business process management adaptable workflow and organizational collaboration. Data will work in an organized, paperless, productive environment with unparalleled openness and efficiency.

Contract includes:

DocFinity is offered through either:

- A traditional on-premise software license
- As a Service, Software as a Service (SaaS) allows sensitive government data to be hosted and secured by CDS, resulting in zero capital expenditure
- CDS supports implementation projects with professional services

Term:

Initial two-year agreement from October 1, 2018 through September 30, 2020 with the option to renew for three (3) additional one-year periods through October 31, 2023.

Pricing/Discount:

Three distinct pricing options available to meet the diverse need of the participating entities:

- SaaS – Private Cloud
- SaaS – Public Cloud
- On-Premise Licensing

List price is provided, but CDS recommends that participating entities work directly with their team of experts to define requirements to structure the most effective program possible. Full DocFinity is priced on a monthly price per concurrent user bases.

National IPA Web Landing Page:

<http://www.nationalipa.org/Vendors/Pages/CompanionDataServices.aspx>