



TOWN OF TAOS SOLE SOURCE REQUEST AND DETERMINATION FORM

A sole source *determination* is not effective until the *sole source request for determination* has been posted for thirty (30) calendar days without challenge, and subsequently approved in writing by the Procurement Officer. The foregoing is a requirement under NMSA 13-1-126 – 13-1-126.1 as amended by Laws 2013, ch. 40 § 6 effective June 14, 2013.

I. Name of Entity: TOWN OF TAOS

Procurement Agent Sharon Voigt
svoigt@taosgov.com
Telephone Number: 575-751-2025

II. Name of prospective Contractor: PDS – Professional Document Systems, Inc.

Address of prospective Contractor: 1414 Common Drive, El Paso, Texas 79936

Amount of prospective contract: \$25,779.89 exclusive of gross receipts tax

Term of prospective contract: Effective June 8, 2018 and to mature on August 12, 2018.

III. Please thoroughly list the services (scope of work), construction or items of tangible personal property of the prospective contract:

Installation and Set-up of Laserfiche Forms and Workflow:

- Install and configure Laserfiche Forms Software on Town Server;
- Discuss and configure the creation of two Laserfiche Forms;
- Discuss, design and configure the workflow associated with the two forms;
- On site, deploy and test the forms and associated workflows;
- Train staff on forms creation and modification;
- Train staff on forms workflow development;
- Laserfiche forms design as designated by the Town;
- 4 Full User with Snapshot and Email Laserfiche Licenses;
- 1 Laserfiche Avante Forms Portal Add-on; and
- 30 Laserfiche Authenticated Participants. – Open Market

Annual Maintenance and Support:

- 4 Laserfiche Avante Named Full Users with Snapshot and Email - Annual Maintenance
- 4 Laserfiche WEB Access – Annual Maintenance
- Laserfiche Avante Forms Portal Add-on – Annual Maintenance; and
- 30 Laserfiche Authenticated Participants – Annual Maintenance. – **Open Market**

IV. Provide an explanation of: the criteria developed and specified by the department.

The Town of Taos has successfully used the Laserfiche Document Management System since 2009 for document imaging and records management. It is the Town’s objective to streamline processes and automate internal and public forms through Laserfiche Forms and Laserfiche Workflow.

V. Provide a detailed, sufficient explanation of the reasons, qualifications, proprietary rights or unique capabilities of the prospective contractor that makes the prospective contractor ***the one source*** capable of providing the required professional service, service, construction or item(s) of tangible personal property. (Please do not state the source is the “best” source or the “least costly” source. Those factors do not justify a “sole source.”)

Professional Document Systems, Inc. is proprietary and the only authorized VAR reseller for their support.

VI. Provide a detailed, sufficient explanation of how the professional service, service, construction or item(s) of tangible personal property is/are ***unique and how this uniqueness is substantially related to the intended purpose of the contract.***

Laserfiche policy dictates that Professional Document Systems, Inc. is the Town’s current value-added reseller (VAR) of record; therefore, as the sole VAR of record Professional Document Systems, Inc. can download software licenses and activations for the Town. Furthermore, as the Town’s VAR of record Professional Document Systems is the only vendor that can provide additional Laserfiche software to expand and upgrade the Town’s Laserfiche system and renew the Laserfiche Software Assurance Plan.

VII. Explain why other similar professional services, services, construction or item(s) of tangible personal property ***cannot*** meet the intended purpose of the contract.

Professional Document Systems Inc. will implement the Laserfiche upgrades; therefore, they will have a better understanding of the Town’s current system. It would take additional time for a different VAR to achieve the same understanding.

VIII. Provide a narrative description of the agency’s due diligence in determining the basis for the procurement, including procedures used by the agency to conduct a review of available sources such as researching trade publications, industry newsletters and the internet; reviewing telephone books and other advertisements; contacting similar service providers; and reviewing the State Purchasing Agent’s vendor list. Include a list of businesses contacted (***do not state that no other businesses were contacted***), date of contact, method of contact (telephone, mail, e-mail, other), and documentation demonstrating an

explanation of why those businesses could not or would not, under any circumstances, perform the contract; or an explanation of why the agency has determined that no businesses other than the prospective contractor can perform the contract.

As the Town’s value-added reseller of record Professional Document System, Inc. will implement Laserfiche Forms and Laserfiche Workflow to the Town’s Laserfiche system pursuant to GSA agreement GS-35F-0118V; however, the GSA agreement does not include Laserfiche authenticated participants and the annual maintenance and support for the authenticated participants. Therefore, the sole source determination is for the “Open Market Items” as identified in the scope of work (Item No. III). Currently, there is a contract in place with Seamless Docs for online forms which will expire on August 13, 2018. It is the intent of the Town of Taos to implement Laserfiche Forms and Laserfiche Workflow prior to the contract maturity date with Seamless Docs. Additional time would be needed should the Town decide to change the VAR of record with Laserfiche.

Certified by:

Department Approval by:

Date: 05/07/2018

Francella R. Garoca
Department Head

If this sole source relates to a procurement of general services:

- 1) Signature of the Town Procurement Officer on this form certifies the sole source has been posted for thirty (30) calendar days and has received no challenges.
- 2) Sole source is granted as of the date of signature by the Procurement Officer.
- 3) Signature of the Procurement Officer on this form is the final signature required for this sole source procurement.

If this sole source relates to a procurement of professional services:

- 1) Signature of the Procurement Officer on this form certifies the sole source has been posted for thirty (30) calendar days and has received no challenge(s).
- 2) Signature of the Procurement Officer (below) is required; and
- 3) Sole source is granted as of the date of signature by the Procurement Officer.

APPROVED:

Date: _____

Town of Taos Procurement Officer

Challenges
