
**COLORADO COUNTY CLERKS ASSOCIATION (“CCCA”)
REQUEST FOR INFORMATION**

**RFI-3915-14-SH
COUNTY CLERKS RECORDING SYSTEM**

**RESPONSES DUE:
Friday, October 10, 2014, prior to 2:00 p.m.
ONLY ELECTRONIC RESPONSES SHALL BE ACCEPTED
PLEASE SEE INSTRUCTIONS DETAILED ON PAGE SIX (6)**

Purchasing Representative:

Susan Hyatt
Senior Buyer

Phone: (970) 244-1513

susanh@gjcity.org

This solicitation has been developed specifically for a Request for Information intended to solicit informational responses for this solicitation. All responders are urged to thoroughly review this solicitation prior to submitting. Submittal by **FAX OR EMAIL IS NOT ACCEPTABLE** for this solicitation.

Overview and Information Introduction

1. **INTRODUCTION:** The Colorado County Clerks Association (“CCCA”) is soliciting information for a County Clerks Recording System (hereafter, the System.) The CCCA is seeking your input in this process and your estimate of cost. The CCCA will evaluate responses to this RFI to establish budgetary and functional requirements for a possible future procurement.

NOTE: This is not an Invitation for Bid or a Request for Proposal

The purpose of this Request for Information (RFI) is to gather information. *No contract or award will be made based on the results of this process.*

2. **PROJECT BACKGROUND:** The Office of the Clerk and Recorder in each of the 64 counties in Colorado is the designated custodian and repository responsible for all deeds, titles, sales documents, water rights, mineral rights and surface rights documents, marriage licenses and civil union licenses. Clerk’s Offices also seek to identify and meet the needs of our stakeholders such as title companies, title plants, mortgage companies, banks, attorneys and the public.

The Colorado County Clerks Association is interested in assisting counties across the state in creating a County Clerks Recording System. Drivers for creating the System include:

- Creation of a universal system that can be used by any county and all recording stakeholders in Colorado;
- Standardization and consistency in protocol, processes and costs;
- Ensuring that all documents (both e-recordings submitted remotely and paper documents received for e-recording) are recorded in the order they are received;
- Provision of online access, both for counties and stakeholders, to the recorded documents of every county who uses the County Clerks Recording System; and
- Provision of a solution that will enable implementation of mandatory all electronic recording statewide.

3. **OVERVIEW:** The County Clerks Recording System will use a single vendor to provide statewide e-recording services, online access to recorded documents, issuance of marriage licenses and civil union licenses, and document management services. Counties and stakeholders will be able to opt-in to the System -- use of the System by each county will be at the discretion of the individual county. The CCCA will not contract for counties -- contracts which may eventually result from a future RFP process will be between individual counties and the vendor. Stakeholders will have online access to recorded documents of all counties who use the System. Because of the advantages counties and stakeholders will derive from use of the County Clerks Recording System, it is anticipated that many Colorado counties will eventually choose to use the County Clerks Recording System.

4. TENTATIVE CALENDAR OF EVENTS

- Request for Information available on or about September 23, 2014
- Inquiry Deadline October 2, 2014
- Responses Due October 10, 2014

5. **OPEN RECORDS:** Responses shall be received and publicly acknowledged at the location, date, and time stated on the cover sheet. Respondents, their representatives and interested persons may be present. Responses shall be received and acknowledged only so as to avoid disclosure of

process. However, all responses shall be open for public inspection after final selection is made. Trade secrets and confidential information contained in the proposal so identified as such shall be treated as confidential to the extent allowable in the Open Records Act.

6. **CONFIDENTIAL MATERIAL:** All materials submitted in response to this RFI shall ultimately become public record and shall be subject to inspection after contract award. **“Proprietary or Confidential Information”** is defined as any information that is not generally known to competitors and which provides a competitive advantage. Unrestricted disclosure of proprietary information places it in the public domain. Only submittal information clearly identified with the words **“Confidential Disclosure”** and placed in a separate envelope (or noted so on the PDF document) shall establish a confidential, proprietary relationship. Any material to be treated as confidential or proprietary in nature must include a justification for the request. The request shall be reviewed and either approved or denied by the Purchasing Supervisor. If denied, the respondent shall have the opportunity to withdraw its entire response, or to remove the confidential or proprietary restrictions. Neither cost nor pricing information nor the total response shall be considered confidential or proprietary.

7. **SALES TAX:** All Colorado counties are, by statute, exempt from the State Sales Tax and Federal Excise Tax. Therefore, all fees shall not include taxes.

Project Requirements

PROJECT INTENT/GOALS

The intent of this project is to provide a complete turnkey off the shelf (COTS) County Clerks Recording System which can be used by any Colorado county to provide the services listed below including e-recording services, issuance of marriage licenses/civil unions, data management and archiving, and to provide online access to all participating counties and stakeholders to recorded documents across the state.

The County Clerks Recording System will need to provide the services listed below, and should be able to provide or perform the specific features or tasks listed on the attached Exhibit A, in any county which uses the System. Hereafter, the services, features and tasks are collectively referred to as “Service” or “Services”.

SERVICES

a) Recording

- i. In-person (over-the counter and kiosk) e-recording
- ii. Web based e-recording

b) Marriage and civil union licenses

- i. Web based applications for marriage licenses and civil union licenses
- ii. Ability to scan supporting marriage license documents as part of the official marriage license record
- iii. Ability to have a rush status or workflow for marriage license and civil union processing

c) Data and image maintenance

- i. House and archive existing and future data and images
- ii. Ability to redact images

d) Online access to images

- i. Allow 24x7 online search and retrieval of all existing and future recorded images
- ii. Online search and retrieval must be available to all participating counties and stakeholders

e) Cashiering

- i. Fee calculation and receipt
- ii. Receive payments at county’s Point of Sale (POS) locations, via the Internet and via kiosks
- iii. Integrate with County’s electronic accounting software

f) Integration with Assessor’s Office data

- i. Update deed and transfer of ownership information into Assessor’s software

g) Reporting

- i. Provide a robust collection of canned operational and financial reports, typically all those needed on a regular basis for management.
- ii. Allows customized reporting, choice of variables, choice of formats for outputs (tables/charts)
- iii. Provide strong analysis/modeling tools that allow customization by management for operational and strategic decision making

h) Printing and Emailing

- i. Provide an automated solution for printing or emailing receipts, mailing labels, documents, reports, etc.

i) Training and Support

- i. Provide pre-, ongoing and post-implementation training and support which will ensure a seamless transition for counties and stakeholders in the use of the System.
- j) Online Access**
 - i. Any county or stakeholder must be able to opt-in to System use. Counties will contract directly with the vendor for the use of the System.
- k) Communication**
 - i. Support multiple formats and customizable communication programs
 - ii. Provide communications directly from the System to counties and stakeholders through email blasting, mail, etc., segmented by any number of selected variables.
 - iii. Provide receipts through multiple channels (receipt printer/email)
- k) Pricing**
 - i. The System should provide a pricing structure for Services that would make the System affordable for any size county, including small counties.
 - ii. Pricing should include, at a minimum, construction, equipment, software, initial and ongoing maintenance, installation of equipment and software, and training.
 - iii. The System should allow for standardization of maintenance costs.
 - iv. Cost should be presented as a total cost for use of all System Services (with an expectation of a discount for those who contract for the use of all Services), and should also be broken out separately for each Service listed above. Counties and stakeholders should be able to discern from a review of this information their monthly or annual cost for use of some or all of the System Services.
 - v. Due to the potential for various counties across the State of Colorado to exercise the option to use the System, a pricing model for a small sized county (<20K recordings), a medium sized county (20K – 100K recordings), and a large sized county (>100K recordings) per year should be included.

Request for Information

For each of the Services listed above, please describe in detail how your company would provide each Service and satisfy each of the requirements. Include any major or minor items of information, even if not specifically requested, that would normally and reasonably be provided. **Responses should be labeled and addressed as shown above.** All sections, including the Response Form, shall be combined into a single PDF document prior to upload.

PLEASE NOTE: Prices submitted as a result of this Request for Information will be used to establish a base price for budgetary purposes only.

Submittal of Information Requirements and Instructions

1. **DELIVERY OF RESPONSES:** Respondents shall submit their response in electronic format only, and only through the Rocky Mountain E-Purchasing website, <https://www.rockymountainbidsystem.com/default.asp>. **This site offers both “free” and “paying” registration options that allow for full access of the Owner’s documents and for electronic submission of proposals.** (Note: “free” registration may take up to 24 hours to process. Please Plan accordingly.) Please view our “Electronic Vendor Registration Guide” at <http://www.gjcity.org/BidOpenings.aspx> for details. **PLEASE NOTE: ALL SECTIONS SHALL BE COMBINED INTO A SINGLE PDF ELECTRONIC DOCUMENT** The due date and time are listed on the front page of this RFI. Late responses will not be considered. Responses will be received and publicly acknowledged at the location, date and time stated. Bidders, their representatives and interested persons may be present. Responses shall be received and acknowledged only so as to avoid disclosure of process. Trade secrets and confidential information contained in the bid so identified by Bidder as such will be treated as confidential to the extent allowable in the Open Records Act.

2. **ADDITIONAL INFORMATION:** In addition to the services and requirements outlined under Project Requirements, please include the following as part of your responses:

- 2.1.1. Response Form
- 2.1.2. Cover letter, including brief company history
- 2.1.3. List of current customers – broken down State, County, type of implementation, dates of service, and average recording volume
- 2.1.4. Please provide your minimum software, hardware and operating system requirements for a standard workstation
- 2.1.5. Disaster recovery is a key component of a business continuity plan. In detail, please explain your disaster recovery services and your standard implementation timeline and requirements
- 2.1.6. Due to the potential for various counties across the State of Colorado to exercise the option to use your system, please explain your pricing model for a small sized county (<20K recordings), a medium sized county (20K – 100K recordings), and a large sized county (>100K recordings) per year

3. **QUESTIONS CONCERNING RFI:** All questions concerning this project shall be directed in writing to: Susan Hyatt, Senior Buyer, City of Grand Junction, susanh@gjcity.org. Any interpretations, corrections and changes to this RFI or extensions to the opening/receipt date shall be made by a written Addendum to the RFI by the City Purchasing Division. Sole authority to authorize addenda shall be vested in the City of Grand Junction Purchasing Representative. Addenda will be issued electronically through the City’s website at www.gjcity.org by selecting the Bids link, and Rocky Mountain Bid System at www.rockymountainbidsystem.com. Offerors shall acknowledge receipt of all addenda in their proposal.

Response Form

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1. Pricing model for a small sized county (<20K recordings) \$ _____
2. Pricing model for a medium sized county (20K – 100K recordings) \$ _____
3. Pricing model for a large sized county (>100K recordings) \$ _____

PLEASE NOTE: Prices submitted as a result of this Request for Information will be used to establish a base price for budgetary purposes only. No award will be made as a result of this solicitation.

ADDENDA: State number of Addenda received: _____.

Date: _____

Company Name – (Typed or Printed)

Authorized Agent – (Typed or Printed)

Authorized Signature of Dealer or Agent

Signature Title

Address of Firm

City, State, and Zip Code

Phone Number

Fax Number

E-mail of Agent or Sales Contact