



**Request for Proposal
RFP-4059-15-SH**

**CLERK AND RECORDER'S
ELECTRONIC RECORDING,
PUBLIC RECORD AND
DOCUMENT STORAGE SYSTEM**

RESPONSES DUE:

June 30, 2015 prior to 2:00 p.m. MST
250 N. 5th Street
City Clerk's Office, Room #111
Grand Junction, CO 81501

PURCHASING REPRESENTATIVE:

Susan Hyatt
Senior Buyer
susanh@gjcity.org
970-244-1513

This solicitation has been developed specifically for a Request for Proposal intended to solicit competitive responses for this solicitation, and may not be the same as previous City of Grand Junction/Mesa County solicitations. All offerors are urged to thoroughly review this solicitation prior to submitting. Submittal by **FAX IS NOT ACCEPTABLE** for this solicitation.

REQUEST FOR PROPOSAL

**Clerk and Recorder's Electronic Recording,
Public Record and Document Storage System**

TABLE OF CONTENTS

Section

1.0 Administrative Information and Conditions for Submittal

2.0 General Contract Terms and Conditions

3.0 Insurance Requirements

4.0 Specifications/Scope of Services

5.0 Preparation and Submittal of Proposals

6.0 Evaluation Criteria and Factors

7.0 Solicitation Response Form

8.0 Proposal Structure

Attachment A, "Questionnaire"

Attachment B, "Submittal Questions"

Attachment C, "Pricing"

REQUEST FOR PROPOSAL
RFP-4059-15-SH

Electronic Recording, Public Record and Document Storage System

SECTION 1.0: ADMINISTRATIVE INFORMATION & CONDITIONS FOR SUBMITTAL

- 1.1 Issuing Office:** This Request for Proposal (RFP) is issued by the City of Grand Junction on behalf of the Mesa County Clerk and Recorder (Owner). All contact regarding this RFP is directed to:

RFP QUESTIONS:

Susan Hyatt/Senior Buyer

susanh@gjcity.org

- 1.2 Purpose:** The purpose of this RFP is to obtain proposals from qualified professional firms to provide an Electronic Recording, Public Record and Document Storage System for the Office of the Clerk and Recorder of Mesa County, Colorado.
- 1.3 The Owner:** The Owner is Mesa County, Colorado and is referred to throughout this Solicitation. The term Owner means the Owner or its authorized representative.
- 1.4 Compliance:** All participating Offerors, by their signature hereunder, shall agree to comply with all conditions, requirements, and instructions of this RFP as stated or implied herein. Should the Owner omit anything from this packet which is necessary to the clear understanding of the requirements, or should it appear that various instructions are in conflict, the Offeror(s) shall secure instructions from the Purchasing Division prior to the date and time of the submittal deadline shown in this RFP. Offeror is responsible for obtaining all solicitation documents, drawing, addenda, etc.
- 1.5 Submission:** Please refer to section 5.0 for what is to be included. Each proposal shall include **One (1) hard copy** and **one (1) electronic copy on CD or USB Flash Drive**, placed in a sealed envelope and marked clearly on the outside **“RFP-4059-15-SH Clerk and Recorder’s Electronic Recording, Public Record and Document Storage System.”** THE ELECTRONIC COPY SHALL BE AN EXACT REPRODUCTION OF THE ORIGINAL DOCUMENT(S) PROVIDED. ALL SECTIONS SHALL BE COMBINED INTO A SINGLE PDF DOCUMENT. **The electronic copy shall be the official document.** For proper comparison and evaluation, the Owner requests that proposals be formatted as directed in Section 5.0 “Preparation and Submittal of Proposals.” Submittals received that fail to follow this format may be ruled non-responsive.
- 1.6 Altering Proposals:** Any alterations made prior to opening date and time must be initialed by the signer of the proposal, guaranteeing authenticity. Proposals cannot be altered or amended after submission deadline.
- 1.7 Withdrawal of Proposal:** A proposal must be firm and valid for award and may not be withdrawn or canceled by the Offeror prior to the sixty-first (61st) day following the submittal deadline date and only prior to award. The Offeror so agrees upon submittal of their proposal. After award this statement is not applicable.

- 1.8 Acceptance of Proposal Content:** The contents of the proposal of the successful Offeror shall become contractual obligations if acquisition action ensues. Failure of the successful Offeror to accept these obligations in a contract shall result in cancellation of the award and such vendor shall be removed from future solicitations.
- 1.9 Exclusion:** No oral, telegraphic, or telephonic proposals shall be considered.
- 1.10 Addenda:** All Questions shall be submitted in writing to the appropriate person as shown in Section 1.1. Any interpretations, corrections and changes to this RFP or extensions to the opening/receipt date shall be made by a written Addendum to the RFP 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 Bidnet at www.rockymountainbidsystem.com. Offerors shall acknowledge receipt of all addenda in their proposal.
- 1.11 Exceptions and Substitutions:** All proposals meeting the intent of this RFP shall be considered for award. Offerors taking exception to the specifications shall do so at their own risk. The Owner reserves the right to accept or reject any or all substitutions or alternatives. When offering substitutions and/or alternatives, Offeror must state these exceptions in the section pertaining to that area. Exception/substitution, if accepted, must meet or exceed the stated intent and/or specifications. The absence of such a list shall indicate that the Offeror has not taken exceptions, and if awarded a contract, shall hold the Offeror responsible to perform in strict accordance with the specifications or scope of work contained herein.
- 1.12 Confidential Material:** All materials submitted in response to this RFP **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 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 proposer shall have the opportunity to withdraw its entire proposal, or to remove the confidential or proprietary restrictions. Neither cost nor pricing information nor the total proposal shall be considered confidential or proprietary.
- 1.13 Response Material Ownership:** All proposals become the property of the Owner upon receipt and shall only be returned to the proposer at the Owner's option. Selection or rejection of the proposal shall not affect this right. The Owner shall have the right to use all ideas or adaptations of the ideas contained in any proposal received in response to this RFP, subject to limitations outlined in the section 1.14 titled "Confidential Material". Disqualification of a proposal does not eliminate this right.
- 1.14 Minimal Standards for Responsible Prospective Offerors:** A prospective Offeror must affirmably demonstrate their responsibility. A prospective Offeror must meet the following requirements:

- Have adequate financial resources, or the ability to obtain such resources as required.
- Be able to comply with the required or proposed completion schedule.
- Have a satisfactory record of performance.
- Have a satisfactory record of integrity and ethics.
- Be otherwise qualified and eligible to receive an award and enter into a contract with the Owner.

1.15 Open Records: Proposals shall be received and publicly acknowledged at the location, date, and time stated herein. Offerors, their representatives and interested persons may be present. Proposals shall be received and acknowledged only so as to avoid disclosure of process. However, all proposals shall be open for public inspection after the contract is awarded. Trade secrets and confidential information contained in the proposal so identified by offer as such shall be treated as confidential by the Owner to the extent allowable in the Open Records Act.

1.16 Sales Tax: City of Grand Junction/Mesa County is, by statute, exempt from the State Sales Tax and Federal Excise Tax; therefore, all fees shall not include taxes.

SECTION 2.0: GENERAL CONTRACT TERMS AND CONDITIONS

2.1. Acceptance of RFP Terms: A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated on the Letter of Interest or Cover Letter by the autographic signature of the Offeror or an officer of the Offeror legally authorized to execute contractual obligations. A submission in response to the RFP acknowledges acceptance by the Offeror of all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and thoroughly any variations between its proposal and the Owner's RFP requirements. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

2.2. Execution, Correlation, Intent, and Interpretations: The Contract Documents shall be signed in not less than triplicate by the Owner (Owner) and Contractor. Signing of the contract documents may occur electronically using DocuSign. Owner shall provide the contract. By executing the contract, the Contractor represents that he/she has visited the site, familiarized himself with the local conditions under which the Work is to be performed, and correlated his observations with the requirements of the Contract Documents. The Contract Documents are complementary, and what is required by any one, shall be as binding as if required by all. The intention of the documents is to include all labor, materials, equipment and other items necessary for the proper execution and completion of the scope of work as defined in the technical specifications and drawings contained herein. All drawings, specifications and copies furnished by the Owner are, and shall remain, Owner property. They are not to be used on any other project, and with the exception of one contract set for each party to the contract, are to be returned to the owner on request at the completion of the work.

2.3. Permits, Fees, & Notices: The Contractor shall secure and pay for all permits, governmental fees and licenses necessary for the proper execution and completion of the work. The Contractor shall give all notices and comply with all laws, ordinances, rules, regulations and orders of any public authority bearing on the performance of the work. If

the Contractor observes that any of the Contract Documents are at variance in any respect, he shall promptly notify the Owner in writing, and any necessary changes shall be adjusted by approximate modification. If the Contractor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, and without such notice to the Owner, he shall assume full responsibility and shall bear all costs attributable.

- 2.4. Responsibility for those Performing the Work:** The Contractor shall be responsible to the Owner for the acts and omissions of all its employees and all other persons performing any of the work under a contract with the Contractor.
- 2.5. Use of the Site:** The Contractor shall confine operations at the site to areas permitted by law, ordinances, permits and the Contract Documents, and shall not unreasonably encumber the site with any materials or equipment.
- 2.6. Cleanup:** The Contractor at all times shall keep the premises free from accumulation of waste materials or rubbish caused by its operations. At the completion of work the Contractor shall remove all its waste materials and rubbish from and about the project, as well as all its equipment and surplus materials.
- 2.7. Payment & Completion:** The Contract Sum is stated in the Contract and is the total amount payable by the Owner to the Contractor for the performance of the work under the Contract Documents. Upon receipt of written notice that the work is ready for final inspection and acceptance and upon receipt of application for payment, the Owner's Project Manager will promptly make such inspection and, when she finds the work acceptable under the Contract Documents and the Contract fully performed, the Owner shall make payment in the manner provided in the Contract Documents. Partial payments will be based upon estimates, prepared by the Contractor, of the value of Work performed and materials placed in accordance with the Contract Documents.
- 2.8. Protection of Persons & Property:** The Contractor shall comply with all applicable laws, ordinances, rules, regulations and orders of any public authority having jurisdiction for the safety of persons or property or to protect them from damage, injury or loss. The Contractor shall erect and maintain, as required by existing safeguards for safety and protection, and all reasonable precautions, including posting danger signs or other warnings against hazards promulgating safety regulations and notifying owners and users of adjacent utilities. When or where any direct or indirect damage or injury is done to public or private property by or on account of any act, omission, neglect, or misconduct by the Contractor in the execution of the work, or in consequence of the non-execution thereof by the Contractor, he shall restore, at his own expense, such property to a condition similar or equal to that existing before such damage or injury was done, by repairing, rebuilding, or otherwise restoring as may be directed, or it shall make good such damage or injury in an acceptable manner.
- 2.9. Changes in the Work:** The Owner, without invalidating the contract, may order changes in the work within the general scope of the contract consisting of additions, deletions or other revisions. All such changes in the work shall be authorized by Change Order and shall be executed under the applicable conditions of the contract documents. A Change Order is a written order to the Contractor signed by the Owner issued after the execution of the contract, authorizing a change in the work or an adjustment in the contract sum or the contract time.

- 2.10. Minor Changes in the Work:** The Owner shall have authority to order minor changes in the work not involving an adjustment in the contract sum or an extension of the contract time and not inconsistent with the intent of the contract documents.
- 2.11. Uncovering & Correction of Work:** The Contractor shall promptly correct all work found by the Owner as defective or as failing to conform to the contract documents. The Contractor shall bear all costs of correcting such rejected work, including the cost of the Owner's additional services thereby made necessary. The Owner shall give such notice promptly after discovery of condition. All such defective or non-conforming work under the above paragraphs shall be removed from the site where necessary and the work shall be corrected to comply with the contract documents without cost to the Owner.
- 2.12. Amendment:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All amendments to the contract shall be made in writing by the Owner's Purchasing Division.
- 2.13. Assignment:** The Contractor shall not sell, assign, transfer or convey any contract resulting from this RFP, in whole or in part, without the prior written approval from the Owner.
- 2.14. Compliance with Laws:** Proposals must comply with all Federal, State, County and local laws governing or covering this type of service and the fulfillment of all ADA (Americans with Disabilities Act) requirements.
- 2.15. Confidentiality:** All information disclosed by the Owner to the Offeror for the purpose of the work to be done or information that comes to the attention of the Offeror during the course of performing such work is to be kept strictly confidential.
- 2.16. Conflict of Interest:** No public official and/or Owner employee shall have interest in any contract resulting from this RFP.
- 2.17. Contract:** This Request for Proposal, submitted documents, and any negotiations, when properly accepted by the Owner, shall constitute a contract equally binding between the Owner and Contractor. The contract represents the entire and integrated agreement between the parties hereto and supersedes all prior negotiations, representations, or agreements, either written or oral, including the Proposal documents. The contract may be amended or modified with Change Orders, Field Orders, or Addendums.
- 2.18. Cancellation of Solicitation:** A solicitation may be canceled or any solicitation response by a vendor may be rejected in whole or in part when it is in the best interest of the Owner.
- 2.19. Project Manager/Administrator:** The Project Manager, on behalf of the Owner, shall render decisions in a timely manner pertaining to the work proposed or performed by the Contractor. The Project Manager shall be responsible for approval and/or acceptance of any related performance of the Scope of Services.
- 2.20. Contract Termination:** This contract shall remain in effect until any of the following occurs: (1) contract expires; (2) completion of services; (3) acceptance of services or, (4) for convenience terminated by either party with a written *Notice of Cancellation* stating

therein the reasons for such cancellation and the effective date of cancellation at least thirty days past notification.

2.21. Employment Discrimination: During the performance of any services per agreement with the Owner, the Offeror, by submitting a Proposal, agrees to the following conditions:

2.21.1. The Offeror shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, disability, citizenship status, marital status, veteran status, sexual orientation, national origin, or any legally protected status except when such condition is a legitimate occupational qualification reasonably necessary for the normal operations of the Offeror. The Offeror agrees to post in conspicuous places, visible to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

2.21.2. The Offeror, in all solicitations or advertisements for employees placed by or on behalf of the Offeror, shall state that such Offeror is an Equal Opportunity Employer.

2.21.3. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

2.22. Immigration Reform and Control Act of 1986 and Immigration Compliance: The Offeror certifies that it does not and will not during the performance of the contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986 and/or the immigration compliance requirements of State of Colorado C.R.S. § 8-17.5-101, *et seq.* (House Bill 06-1343).

2.23. Ethics: The Offeror shall not accept or offer gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of the Owner.

2.24. Failure to Deliver: In the event of failure of the Contractor to deliver services in accordance with the contract terms and conditions, the Owner, after due oral or written notice, may procure the services from other sources and hold the Contractor responsible for any costs resulting in additional purchase and administrative services. This remedy shall be in addition to any other remedies that the Owner may have.

2.25. Failure to Enforce: Failure by the Owner at any time to enforce the provisions of the contract shall not be construed as a waiver of any such provisions. Such failure to enforce shall not affect the validity of the contract or any part thereof or the right of the Owner to enforce any provision at any time in accordance with its terms.

2.26. Force Majeure: The Contractor shall not be held responsible for failure to perform the duties and responsibilities imposed by the contract due to legal strikes, fires, riots, rebellions, and acts of God beyond the control of the Contractor, unless otherwise specified in the contract.

2.27. Indemnification: Offeror shall defend, indemnify and save harmless the Owner, State of Colorado, and all its officers, employees, insurers, and self-insurance pool, from and against all liability, suits, actions, or other claims of any character, name and description

brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the Offeror, or of any Offeror's agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from proposal award. Offeror shall pay any judgment with cost which may be obtained against the Owner growing out of such injury or damages.

- 2.28. Independent Firm:** The Offeror shall be legally considered an Independent Firm and neither the Firm nor its employees shall, under any circumstances, be considered servants or agents of the Owner. The Owner shall be at no time legally responsible for any negligence or other wrongdoing by the Firm, its servants, or agents. The Owner shall not withhold from the contract payments to the Firm any federal or state unemployment taxes, federal or state income taxes, Social Security Tax or any other amounts for benefits to the Firm. Further, the Owner shall not provide to the Firm any insurance coverage or other benefits, including Workers' Compensation, normally provided by the Owner for its employees.
- 2.29. Nonconforming Terms and Conditions:** A proposal that includes terms and conditions that do not conform to the terms and conditions of this Request for Proposal is subject to rejection as non-responsive. The Owner reserves the right to permit the Offeror to withdraw nonconforming terms and conditions from its proposal prior to a determination by the Owner of non-responsiveness based on the submission of nonconforming terms and conditions.
- 2.30. Ownership:** All plans, prints, designs, concepts, etc., shall become the property of the Owner.
- 2.31. Oral Statements:** No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in this document and/or resulting agreement. All modifications to this request and any agreement must be made in writing by the Owner.
- 2.32. Patents/Copyrights:** The Offeror agrees to protect the Owner from any claims involving infringements of patents and/or copyrights. In no event shall the Owner be liable to the Offeror for any/all suits arising on the grounds of patent(s)/copyright(s) infringement. Patent/copyright infringement shall null and void any agreement resulting from response to this RFP.
- 2.33. Remedies:** The Offeror and Owner agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.
- 2.34. Venue:** Any agreement as a result of responding to this RFP shall be deemed to have been made in, and shall be construed and interpreted in accordance with, the laws of the City of Grand Junction, Mesa County, Colorado.
- 2.35. Expenses:** Expenses incurred in preparation, submission and presentation of this RFP are the responsibility of the company and cannot be charged to the Owner.
- 2.36. Sovereign Immunity:** The Owner specifically reserves its right to sovereign immunity pursuant to Colorado State Law as a defense to any action arising in conjunction to this agreement.

- 2.37. Public Funds/Non-Appropriation of Funds:** Funds for payment have been provided through the City of Grand Junction/Mesa County budget approved by the City Council/Board of County Commissioners for the stated fiscal year only. State of Colorado statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the stated City of Grand Junction/Mesa County fiscal year shall be subject to budget approval. Any contract will be subject to and must contain a governmental non-appropriation of funds clause.
- 2.38. Collusion Clause:** Each Offeror by submitting a proposal certifies that it is not party to any collusive action or any action that may be in violation of the Sherman Antitrust Act. Any and all proposals shall be rejected if there is evidence or reason for believing that collusion exists among the proposers. The Owner may or may not, at the discretion of the Owner Purchasing Representative, accept future proposals for the same service or commodities for participants in such collusion.
- 2.39. Gratuities:** The Offeror certifies and agrees that no gratuities, kickbacks or contingency fees were paid in connection with this contract, nor were any fees, commissions, gifts or other considerations made contingent upon the award of this contract. If the proposer breaches or violates this warranty, the Owner may, at their discretion, terminate this contract without liability to the Owner.
- 2.40. Safety Warranty:** Offeror also warrants that the services performed shall conform to the standards declared by the US Department of Labor under the Occupational Safety and Health Act of 1970.
- 2.41. OSHA Standards:** All Offerors agree and warrant that services performed in response to this invitation shall conform to the standards declared by the US Department of Labor under the Occupational Safety and Health Act of 1970 (OSHA). In the event the services do not conform to OSHA Standards, the Owner may require the services to be redone at no additional expense to the Owner.
- 2.42. Performance of the Contract:** The Owner reserves the right to enforce the performance of the contract in any manner prescribed by law or deemed to be in the best interest of the Owner in the event of breach or default of resulting contract award.
- 2.43. Benefit Claims:** The Owner shall not provide to the Offeror any insurance coverage or other benefits, including Worker's Compensation, normally provided by the Owner for its employees.
- 2.44. Default:** The Owner reserves the right to terminate the contract immediately in the event the Offeror fails to meet delivery or completion schedules, or otherwise perform in accordance with the accepted proposal. Breach of contract or default authorizes the Owner to purchase like services elsewhere and charge the full increase in cost to the defaulting Offeror.
- 2.45. Multiple Offers:** Proposers must determine for themselves which product to offer. If said proposer chooses to submit more than one offer, THE ALTERNATE OFFER must be clearly marked "Alternate Proposal". The Owner reserves the right to make award in the best interest of the Owner.

2.46. Cooperative Purchasing: Purchases as a result of this solicitation are primarily for the Owner. Other governmental entities may be extended the opportunity to utilize the resultant contract award with the agreement of the successful provider and the participating agencies. All participating entities will be required to abide by the specifications, terms, conditions and pricings established in this Proposal. The quantities furnished in this proposal document are for only the Owner. It does not include quantities for any other jurisdiction. The Owner will be responsible only for the award for our jurisdiction. Other participating entities will place their own awards on their respective Purchase Orders through their purchasing office or use their purchasing card for purchase/payment as authorized or agreed upon between the provider and the individual entity. The Owner accepts no liability for payment of orders placed by other participating jurisdictions that choose to “*piggy-back*” on our solicitation. Orders placed by participating jurisdictions under the terms of this solicitation will indicate their specific delivery and invoicing instructions.

2.47. Definitions:

- 2.47.1.** “Consultant” refers to the person, partnership, firm or corporation entering into an Agreement with the Owner for the services required and the legal representatives of said party or the agent appointed to act for said party in the performance of the service(s) contracted for.
- 2.47.2.** “Offeror” refers to the person or persons legally authorized by the Consultant to make an offer and/or submit a bid (fee) proposal in response to the Owner’s RFP.
- 2.47.3.** The term “Work” includes all labor necessary to produce the requirements by the Contract Documents, and all materials and equipment incorporated or to be incorporated in such construction.
- 2.47.4.** “Owner” is Mesa County, Colorado and is referred to throughout the Contract Documents. The term Owner means the Owner or his authorized representative. The Owner shall, at all times, have access to the work wherever it is in preparation and progress. The Contractor shall provide facilities for such access. The Owner will make periodic visits to the site to familiarize himself generally with the progress and quality of work and to determine, in general, if the work is proceeding in accordance with the contract documents. Based on such observations and the Contractor’s Application for Payment, the Owner will determine the amounts owing to the Contractor and will issue Certificates for Payment in such amounts, as provided in the contract. The Owner will have authority to reject work which does not conform to the Contract documents. Whenever, in his reasonable opinion, he considers it necessary or advisable to insure the proper implementation of the intent of the Contract Documents, he will have authority to require the Contractor to stop the work or any portion, or to require special inspection or testing of the work, whether or not such work can be then be fabricated, installed, or completed. The Owner will not be responsible for the acts or omissions of the Contractor, and sub-Contractor, or any of their agents or employees, or any other persons performing any of the work.

2.47.5. “Contractor is the person or organization identified as such in the Agreement and is referred to throughout the Contract Documents. The term Contractor means the Contractor or his authorized representative. The Contractor shall carefully study and compare the General Contract Conditions of the Contract, Specification and Drawings, Scope of Work, Addenda and Modifications and shall at once report to the Owner any error, inconsistency or omission he may discover. Contractor shall not be liable to the Owner for any damage resulting from such errors, inconsistencies or omissions. The Contractor shall not commence work without clarifying Drawings, Specifications, or Interpretations.

2.47.6. “Sub-Contractor is a person or organization who has a direct contract with the Contractor to perform any of the work at the site. The term sub-contractor is referred to throughout the contract documents and means a sub-contractor or his authorized representative.

2.48. Public Disclosure Record: If the bidder has knowledge of their employee(s) or sub-contractors having an immediate family relationship with an Owner employee or elected official, the Offeror must provide the Purchasing Representative with the name(s) of these individuals. These individuals are required to file an acceptable “Public Disclosure Record”, a statement of financial interest, before conducting business with the Owner.

2.49. Keep Jobs in Colorado Act: Contractor shall be responsible for ensuring compliance with Article 17 of Title 8, Colorado Revised Statutes requiring 80% Colorado labor to be employed on public works. Contractor shall, upon reasonable notice provided by the Owner, permit the Owner to inspect documentation of identification and residency required by C.R.S. §8-17-101(2)(a). If Contractor claims it is entitled to a waiver pursuant to C.R.S. §8-17-101(1), Contractor shall state that there is insufficient Colorado labor to perform the work such that compliance with Article 17 would create an undue burden that would substantially prevent a project from proceeding to completion, and shall include evidence demonstrating the insufficiency and undue burden in its response.

Unless expressly granted a waiver by the Owner pursuant to C.R.S. §8-17-101(1), Contractor shall be responsible for ensuring compliance with Article 17 of Title 8, Colorado Revised Statutes requiring 80% Colorado labor to be employed on public works. Contractor shall, upon reasonable notice provided by the Owner, permit the Owner to inspect documentation of identification and residency required by C.R.S. §8-17-101(2)(a).

2.49.1. "Public works project" is defined as:

- (a)** any construction, alteration, repair, demolition, or improvement of any land, building, structure, facility, road, highway, bridge, or other public improvement suitable for and intended for use in the promotion of the public health, welfare, or safety and any maintenance programs for the upkeep of such projects
- (b)** for which appropriate or expenditure of moneys may be reasonably expected to be \$500,000.00 or more in the aggregate for any fiscal year
- (c)** except any project that receives federal moneys.

SECTION 3.0: INSURANCE REQUIREMENTS

3.1 Insurance Requirements: The selected Firm agrees to procure and maintain, at its own cost, policy(s) of insurance sufficient to insure against all liability, claims, demands, and other obligations assumed by the Firm pursuant to this Section. Such insurance shall be in addition to any other insurance requirements imposed by this Contract or by law. The Firm shall not be relieved of any liability, claims, demands, or other obligations assumed pursuant to this Section by reason of its failure to procure or maintain insurance in sufficient amounts, durations, or types.

Firm shall procure and maintain and, if applicable, shall cause any Subcontractor of the Firm to procure and maintain insurance coverage listed below. Such coverage shall be procured and maintained with forms and insurers acceptable to The Owner. All coverage shall be continuously maintained to cover all liability, claims, demands, and other obligations assumed by the Firm pursuant to this Section. In the case of any claims-made policy, the necessary retroactive dates and extended reporting periods shall be procured to maintain such continuous coverage. Minimum coverage limits shall be as indicated below unless specified otherwise in the Special Conditions:

(a) Worker Compensation insurance to cover obligations imposed by applicable laws for any employee engaged in the performance of work under this Contract, and Employers' Liability insurance with minimum limits of:

ONE MILLION DOLLARS (\$1,000,000) each accident,
ONE MILLION DOLLARS (\$1,000,000) disease - policy limit, and
ONE MILLION DOLLARS (\$1,000,000) disease - each employee

(b) General Liability insurance with minimum combined single limits of:

ONE MILLION DOLLARS (\$1,000,000) each occurrence and
ONE MILLION DOLLARS (\$1,000,000) per job aggregate.

The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts), blanket contractual, products, and completed operations. The policy shall include coverage for explosion, collapse, and underground hazards. The policy shall contain a severability of interests provision.

(c) Comprehensive Automobile Liability insurance with minimum combined single limits for bodily injury and property damage of not less than:

ONE MILLION DOLLARS (\$1,000,000) each occurrence and
ONE MILLION DOLLARS (\$1,000,000) aggregate

This policy shall provide coverage to protect the contractor against liability incurred as a result of the professional services performed as a result of responding to this Solicitation.

With respect to each of Consultant's owned, hired, or non-owned vehicles assigned to be used in performance of the Work. The policy shall contain a severability of interests provision. The policies required by paragraphs (b), and (c) above shall be endorsed to

include the Owner and the Owner's officers and employees as additional insureds. Every policy required above shall be primary insurance, and any insurance carried by the Owner, its officers, or its employees, or carried by or provided through any insurance pool of the Owner, shall be excess and not contributory insurance to that provided by Consultant. No additional insured endorsement to any required policy shall contain any exclusion for bodily injury or property damage arising from completed operations. The Consultant shall be solely responsible for any deductible losses under any policy required above.

SECTION 4.0: SPECIFICATIONS/SCOPE OF WORK

- 4.1. General/Background:** The Mesa County Clerk and Recorder is seeking proposals to replace its existing Harris Aptitude Solutions system for recording, public records, document storage and marriage licenses. The Clerk and Recorder is seeking a complete turnkey commercial off the shelf (COTS) solution. The system must be capable of meeting the Clerk's core goals of security, privacy, accuracy, priority/sequencing of recording, on-line access, standardization and preservation. The system must include:

- Architecture and design (system diagram)
- Installation
- Recording system monitoring and management
- Recording system maintenance and upgrades
- Operations Support Systems (OSS)
- Customer service and technical support
- Development and test environment
- Program and project management
- Training and mentoring
- Equipment (optional costing, must include specifications for all equipment required)

This RFP identifies requirements that proposals must meet to be considered. These business functions and technical capabilities are mandatory components of a proposal. If the proposal does not specifically address these requirements, the proposal may be eliminated from further consideration. Proposals shall respond in a point-by-point format to each and every requirement listed in this RFP, including Attachments A, B and C. Failure to provide a clearly noted response to all requirements may result in a lowered evaluation score and/or the proposal being deemed non-responsive to the RFP.

Please note section 2.45 Cooperative Purchasing. It is anticipated that other governmental entities may choose to "piggyback" on this RFP. Proposers are asked to **provide scalable pricing options** to allow other governmental entities to evaluate the cost to select one of the proposals for its jurisdiction.

4.2. Operating Environment

4.2.1. Existing Recording System: The existing Recording system runs on a system for which the server operating system is Microsoft server 2008 R2 or above and the database operating system is Microsoft SQL server 2008 R2 or above. Related websites and web services run on Microsoft IIS. The related servers are virtualized and are hosted in a VMware environment. The host network is Microsoft based and uses an Active Directory Domain for file and print services as well as authentication and security.

The existing recording system contains records dating back to 1883 with approximately 2.7 million records currently in the system.

4.2.2 County Network: Mesa County operates a gigabit ethernet fiber backbone network to 22 buildings across the county campus serving 1000+ users. The Cisco switched network provides a 1 gb bandwidth to the desktop. The internet connection is 100 mb. Mesa County utilizes VMware hosted Microsoft Windows servers centrally located at Mesa County's datacenter including application, web and Microsoft SQL servers. The server operating system is Microsoft server 2008 R2 or above and the database operating system is Microsoft SQL server 2008 R2 or above. Microsoft IIS is preferred for any internally hosted websites.

4.3 Equipment Inventory

4.3.1 Servers: Currently there are no server(s) identified for the function of this RFP. The successful Offeror will specify, in detail, the server needs and include all software, hardware and licenses as a separate part of the proposal. Licenses and Proprietary costs will be indicated in the cost/fee proposal. Proposals should include licensing for 3 separate environments; Production; Test and Development Systems. The County may elect to use existing hardware or hardware purchased outside of this RFP if deemed feasible.

Server hardware will reside at Mesa County's datacenter. LAN connections to the Department are existing and not a consideration for this RFP.

4.3.2 Workstations: The Recording Division is currently using a variety of Windows workstations. The solution must work on a minimum workstation specification below:

Windows 7 Professional 64 Bit, Service Pack 1
Intel Core I5 -2400
8GB ram
1GB onboard video
Optical TB mouse
19 inch monitor lowest res 800x600

The successful Offeror will specify in detail, the minimum workstation needs, paying particular attention to the requirements for monitor size and resolution. Additional hardware may need to be purchased based on the Offeror requirements and will be a consideration of the overall cost of the proposal.

4.3.3 Printers: All current printers have direct Ethernet connection to network. These printers are run from a variety of servers that hold the drivers for each workstation.

Printers are primarily Dymo for label printing and Xerox all in one Copier/Printers, with a few HP Laserjets.

The printers specified for each proposal must be able to meet the requirements of producing the necessary reports as outlined in the Scope of Work section, as well as capable of producing reception receipts, copies of documents through the

proposed imaging system, marriage licenses, reception number labels with bar code and necessary labels for returning documents.

4.3.4 Image Capture/Scanning: Currently the Recording Division captures all documents on eight scanners:

Five: Fujitsu 5530C2

Two: Fujitsu 5530C

One: Fujitsu 6240Z

While it is our desire to maintain and continue using these scanners with a new system in place, Offerors may submit additional hardware requirements needed to meet your software specifications. These requirements should be listed in the proposal and will be a consideration of overall cost.

Proposals must include detailed description of software used for the method of capturing images should it differ from what is currently in place.

Currently the Recording Division is scanning approximately 150 documents per day (approximately 600 sheets scanned daily). These numbers are expected to double or triple in the future as the economy improves in Mesa County. Proposals should take into consideration that Mesa County may need a system which will accommodate a significantly higher volume of documents than our current workload.

4.3.5 Servers: Offeror must propose a software solution that is capable of operating in a Microsoft Windows SQL Server 2008R2 or above Server Operating System. SQL server is the County's preferred database platform.

Offeror must specify and propose a maintenance plan for application and SQL servers involved in the proposed system including points of dynamic data which need to be included in a data backup plan.

Offeror must specify the system requirements for servers proposed in the system including prerequisites such as server roles and features.

Additionally, Offeror must issue a statement indicating it will support the Offeror's software under future versions of Microsoft Server for the duration of the relationship between Owner and Offeror.

4.3.6 Workstations: Offeror must propose a software solution that operates on any of the Microsoft Workstation Operating Systems – Windows 7 Professional for Client Workstations. The Recording Division intends to maintain or install and support any combination of these workstations on its LAN. Offeror must certify that all features in the proposed solution will operate fully on these workstations.

Offeror must specify the system requirements for workstations proposed in the system including any prerequisite software.

4.4 Special Conditions/Provisions: In addition to any requirements stated elsewhere in this RFP, the following will also apply. Any proposal will only be given preference if the system runs on the existing environment which includes Google Apps for Government

email and Crystal Reports. Vendor should describe any integration with other software systems, e.g. GIS (ESRI), Colorado.gov Payport solution. Product must be capable of running on Windows workstations joined to a Microsoft Active Directory domain. It must be compatible with Windows 7 Professional clients. Please specify software and/or hardware requirements for the proposed system. If the proposed system runs under a different environment, specify and identify all hardware requirements. Any new application(s) must be proven to work in the described Mesa County operating environment.

For each of the functional options, provide a cost and time estimate for both in-house hosted and cloud based solutions.

4.4.1 Option 1 – In-house, hardware provided by the County: Specify:

- Minimum server requirements
- Recommended server requirements
- Are virtualized servers acceptable
- Operating System requirements
- Database requirements
- Workstation requirements hardware, operating system/s
- Type of access needed for support

4.4.2 Option 2 – Cloud based system (SaaS): Specify:

- Location
- Bandwidth requirements (based on number of users)
- Storage location/s
- Security, redundancy and backup procedures

4.4.3 Turn-key implementation process for both cloud and onsite solutions. Specify:

- Sample Gantt Chart
- Pre-project meeting and information gathering requirements
- Project plan, documentation and approval process
- Development process
- Testing Phase
- Training Phase
- Go-live phase
- Post live support and development
- Dedicated staff for Vendor
- Dedicated staff/staff involvement for County
- Ongoing support and upgrade process

4.5 Scope of Work: The Clerk and Recorder's Office is seeking a proposal to provide a recording, public records, document storage and marriage licenses solution that will meet the minimum requirements listed in the sections below. A completed Attachment A (Questionnaire), Attachment B (Submittal Questions) and Attachment C (Pricing) must be provided with all proposals.

4.6 General System Requirements:

- 4.6.1** System will work on latest software (client OS, server OS, SQL server, etc.) and will continue to be supported by vendor through County's software updates;
- 4.6.2** Regularly scheduled software upgrades from Contractor (issue fixes and updated functionality);

- 4.6.3** System will be maintained and evolve forward in time with support for future operating systems for servers and workstations, future versions of IIS, future browser versions, cross browser platforms and future versions of middleware such as .net framework and others.
- 4.6.4** Hosted server model system (database offsite with backup/recovery options);
- 4.6.5** Capability for all existing recorded documents to be accessed by all Recording customers. (Recording customers includes Clerk's staff, other County Departments, the public using our public access terminals and customers who subscribe to online access.)
- 4.6.6** Capability to have multiple windows (transactions, searches, etc.) open at the same time;
- 4.6.7** Capability to convert images from one type of format to another (for example PDF to TIFF) for both single-page and multi-page formats.
- 4.6.8** Hot key functions in all processes in order to limit the need to use the mouse;
- 4.6.9** Provides a modern, easy way, such as available Application Program Interfaces (APIs), to connect/interface to other systems/software.

4.7 Recording/eRecording

- 4.7.1** Recording/e-Recording of documents of all sizes, including large plats and the option to record documents in color. Documents may be submitted for recording electronically, via mail delivery or as walk-ins;
- 4.7.2** All documents, once statutory requirements are verified, are recorded in the order they are received, imaged, annotated, fees are cashiered, and assigned a reception number immediately;
- 4.7.3** Capability to record/eRecord, search without going into separate 'modes'.
- 4.7.4** Capability to add copies or other fees to a recording transaction without going into a separate transaction type;
- 4.7.5** Quality Assurance review of documents with the ability to enhance or reject the image;
- 4.7.6** Manual document indexing;
- 4.7.7** Capability to use special characters (for example, / and #) in indexing data field;
- 4.7.8** Capability to start an indexing data field with a number;
- 4.7.9** Capability to back post/historically index (edit data and images that have reception numbers but have not been indexed) to allow indexing, addition of pages, replacement of pages, and addition of documents without needing vendor to perform these functions;
- 4.7.10** Capability to use hot keys in back posting/indexing;
- 4.7.11** Capability to change date in back post/index if current year is accidentally entered without needing vendor to perform this function;
- 4.7.12** Duplicated functionality in back posting as in recording and eRecording, including hot key functions and copy and paste;
- 4.7.13** Internal/Organic eRecord function to enable County supported divisions such as Public Trustee, Planning, Clerk to the Board, Treasurer and other Offices or Departments to submit eRecording without a per document fee and without the need to use 3rd part eRecord vendor;
- 4.7.14** Capability to remove items from suspense queue or marriage license queue, and drop after 30 days or other time period chosen by Owner;
- 4.7.15** Ability to import historical images, create an index if it doesn't exist and match up images to existing index (support the format and page count);
- 4.7.16** Blind key verification of key designated indexing fields on document;
- 4.7.17** Ability to have flexible workflows in regards to scanning to support all workflows;

- 4.7.18** Indexing and Verification Queues with the ability to divide and segregate workflows, based on user experience and permissions;
- 4.7.19** Capability to pull indexing data from related document and also another document in same transaction (not just the previous document in transaction);
- 4.7.20** Capability to pull indexing data from document from search result;
- 4.7.21** Capability to index and verify from remote location;
- 4.7.22** Automated index functionality – OCR technology – lasso, grantor/grantee name recognition, and including capability to recognize special characters (for example / and #), etc.
- 4.7.23** Capability to authenticate/certify images electronically with verification that specifies document;
- 4.7.24** Artificial Intelligence redaction;
- 4.7.25** OCR redaction;
- 4.7.26** Support of PRIA eRecording models and XML standards;
- 4.7.27** Print management system that: ensures accuracy, tracks the numbers of prints and charges for each page on a per-customer basis and offers the ability to use a “shopping cart” functionality;
- 4.7.28** Self-service print/search kiosk;
- 4.7.29** Bulk FTP or SFTP exports and hosting (data and image extracts)
- 4.7.30** Integrated eRecording feature/module/interface with eRecording submitters and vendors, current and future; provide a list of currently supported vendors;
- 4.7.31** Provide support for multiple record books with independent reception numbers and the ability to create/add new record books and reception number configurations;
- 4.7.32** Configure and update the Recording Stamp;
- 4.7.33** Ability to add an electronic recording stamp to paper documents rather than a label;
- 4.7.34** Ability to make entire images confidential and indicate images are confidential; a generic splash page will display instead;
- 4.7.35** Insertion of bank and fill pages for voided documents or reception number not used;
- 4.7.36** Capability to create multiple legal descriptions (subdivisions, lots, blocks, sections, townships and ranges) with a single entry;
- 4.7.37** Capability to create alpha codes to auto fill frequently used grantors/grantees and mailing addresses;
- 4.7.38** Capability to place a hold on a problem transaction which will enable staff to continue to progress with items in queues;
- 4.7.39** Doc link to reception number;
- 4.7.40** Strong search criteria capabilities (any combination of grantor, grantee, first name, address, doc legal, remarks, doc type, document type, record date, sale price, soundex, wildcards, etc. (internal and web search));
- 4.7.41** Strong search results capabilities (sorting, additional filters, distinct result per reception number, etc.) (both internal and web search);
- 4.7.42** Capability to add redactions to images;
- 4.7.43** Capability to add annotations to images;
- 4.7.44** Capability to import and export images;
- 4.7.45** A web presentation where identified subscribers can 1) view a watermarked document without permitting printing or downloading, and 2) purchase the document without the watermark using a credit card or escrow account;
- 4.7.46** A web presentation which allows users to search all available meta data for documents;

- 4.7.47 Online search and retrieval must be available to customers and Clerk's staff 24 hours a day, seven days per week;
- 4.7.48 Capability to extract archive images and indices (or metadata) either on a scheduled or ad hoc basis;
- 4.7.49 Integration with SIRE for grantor/grantee indices;
- 4.7.50 Support for searchable PDF file formats;
- 4.7.51 Multiple locations must have the ability to record simultaneously

4.8 Marriage Licenses and Civil Unions

- 4.8.1 Issue Licenses
- 4.8.2 Scan Licenses including ability to scan and attach supporting marriage license/civil union documents as part of the official marriage license/civil union record;
- 4.8.3 Record Licenses
- 4.8.4 Ability to have a rush status or workflow for marriage/civil union licenses processing;
- 4.8.5 Capability to search marriage licenses by a variety of criteria including gender and proxy;
- 4.8.6 A web presentation which allows applicants to enter their non-sensitive information into an online application, either from a kiosk in a Clerk and Recorder office location or from offsite (such as from home), which data can be uploaded to complete marriage/civil union forms;
- 4.8.7 Multiple locations must have ability to issue licenses simultaneously;

4.9 Data and Image Conversion and Maintenance: Ability to house and archive existing and future data and images with ability for Clerk's staff, customers and public to access all existing and future images;

4.10 Printing: Capability to allow clerks to selectively and easily change print properties on documents to be printed (printer, page size, duplex, etc.);

4.11 Emailing: Capability to allow clerks to email documents directly from the system (does not require document to first be printed to PDF, then attached to an email);

4.12 Reports and Data Tracking

- 4.12.1 Provides a robust collection of canned operational and financial reports, typically all those needed on a regular basis for management.
- 4.12.2 Provides a strong analysis/modeling tools that can be customized by Owner for operational and strategic decision making;
- 4.12.3 Ad-hoc reporting, including capability for clerks to add to, modify and design reports without vendor assistance;
- 4.12.4 Ability to track and report transactions completed, transactions by clerk, transactions by clerk and type (i.e. Clerk 1 verified 10 documents on 4/4 and Clerk 2 verified 15 documents on 4/4) customer wait times, and amount of time spent per transaction type, sorted by transaction type, date range, time range (0:00-23:25), person providing service, etc.

4.13 Payment Management, Financials

- 4.13.1 Auto-pay capability with eCommerce option – subscription service without need to invoice;

- 4.13.2 Internal accounting/invoicing system – issues invoices for customers who do not pay immediately in-person or via the eCommerce option, tracks charges, payments and account balance;
- 4.13.3 Receipt of all revenues, including monies for services other than Recorder functions, such as passports, copies and data from other Divisions, such as Elections, etc.
- 4.13.4 Support for many account types and payment options, such as:
 - Cash;
 - Check;
 - Credit Cards;
 - Drawdown accounts;
 - ACH accounts;
 - Escrow accounts;
 - E-commerce functions;
- 4.13.5 Cash drawer management;
- 4.13.6 Cash balancing on individual basis for each cashier;
- 4.13.7 Integration with Colorado.gov Payport solution;
- 4.13.8 Integration with Tyler Technologies, Eden Financial Software and Tyler Cashiering; the Clerk and Recorder is seeking a proposed solution which provides a modern, easy way, such as available Application Program Interfaces (APIs), to connect/interface to other systems/software.
- 4.13.9 General ledger account association with all transaction types based upon Generally Accepted Accounting Principles;
- 4.13.10 Ability to endorse and scan checks;
- 4.13.11 Ability to have web searchers select and pay for documents via credit card online without clerk interaction (shopping cart functionality);
- 4.13.12 Flexible options to charge online web access customers;
- 4.13.13 Revise transaction information at a later date (for over- and under-collects) – though allow transaction to remain association to the original business date without compromising another day's business;
- 4.13.14 Ability to set amounts for overages to create refund paperwork and reports;
- 4.13.15 Accounting, payment and financial functions must integrate with County's electronic accounting software (Tyler Technologies, Eden Financial Software).

4.14 Security and Auditing

- 4.14.1 Support of security roles to provide appropriate user access and control, both for internal recording system and external web site presentations;
- 4.14.2 Audit data and document changes for error correction, fraud detection, and general management;
- 4.14.3 Security roles which prevent the retention of credit card information and protect other sensitive data that may be gathered during normal business operations (dates of birth, social security numbers, etc.).

4.15 Vendor Remote Access

- 4.15.1 Mesa County maintains a private network and security is of utmost concern. Please state any and all remote access requirements for system implementation and system maintenance;
- 4.15.2 All remote access sessions must be coordinated through the County IT and/or the Clerk and Recorder's designated agent.

- 4.16 Mortgage Fraud Prevention;** Capability for grantor/grantee to receive an automated notification of filing of document containing their name and/or address (for example, email notification);
- 4.17 Solutions for Associated Offices/Departments**
- 4.17.1** Capability to integrate with Assessor's system (Tyler Eagle Assessor) for real time transfer of data or records impacting land ownership;
 - 4.17.2** Presentation specific to Assessor Office needs;
 - 4.17.3** Presentation specific to Public Trustee needs;
 - 4.17.4** Internal submission of electronic documents from other County Offices or Departments (for Treasurer Tax Sale, as one example);
- 4.18 Service and Support**
- 4.18.1** Service Level Agreement with guaranteed response/resolution times;
 - 4.18.2** Support/Ticket system that allows clerks and IT staff to check progress of tickets online;
 - 4.18.3** Clerk and IT staff access to Vendor Technical Support team for problem reporting, remote session troubleshooting and general support activities.
- 4.19 (Optional Functionality) Future Enterprise Document Workflow Management Expansion**
- 4.19.1** (Optional) It is desirable for the proposed system to include the capacity for an enterprise document workflow management solution to provide a case, document, recording, imaging, transaction and retrieval management system for department work processes. This solution will eliminate and/or minimize the number of printed documents, accelerate workflow for approval and application filing processes, enhance collaboration, and give other agencies and the public easier, more cost effective access to applications and public documents.
 - 4.19.2** (Optional) Solution for Planning and Development Application Submittal and Review
 - 4.19.3** (Optional) Solution for Agenda and Minutes Workflow Management and online postings of documents and video.
- 4.20 Training**
- 4.20.1** Training at various levels to Clerk and Recorder staff and stakeholders including:
 - Administrator Level (Advanced to Expert)
 - Power User (Intermediate to Advanced)
 - End User (Beginning to Intermediate)
 - 4.20.2** Appropriate training materials, manuals and tools shall be provided by Offeror.
 - 4.20.3** Offeror must be prepared to provide application training for up to twenty (20) people.
- 4.21 Implementation Timeline:** The proposal must include an implementation timeline that states:
- 4.21.1** General tasks to be completed;
 - 4.21.2** Whose responsibility it is to complete each task;
 - 4.21.3** The amount of time in calendar days needed to fully implement the system.
 - 4.21.4** Due to the timeliness of the schedule and the statutory requirements in place for the Clerk and Recorder's Office, the Contractor will be held accountable to a timeline and penalties and damages may be assessed where scheduled goals are not met.

4.22 Pricing

4.22.1 In anticipation that other counties may wish to “piggy back” on this RFP, please provide pricing for small, medium and large counties. The offer should describe in its proposal how it defines a small, medium and large county.

4.22.2 Pricing should include, at a minimum, construction, equipment, software, initial and ongoing maintenance, installation of equipment and software, and training.

4.22.3 Cost should be presented as a total cost for use of all System services;

4.22.4 The County should be able to discern from a review of this information its monthly or annual cost for use of the System services.

4.23 **Contract Period:** The initial contract period shall be twelve (12) months beginning upon the execution of the contract. The awarded Contractor and the Owner agree that this Request for Proposal or subsequent contract may, upon mutual agreement of the Contractor and the Owner, be extended according to the terms of the contract for additional one (1) year periods for as long as the system is in place, contingent upon the applicable fiscal year funds.

4.24 RFP Tentative Time Schedule:

- Request for Proposal available May 22, 2015
- Inquiry deadline at noon, no questions after this date June 19, 2015
- Submittal deadline for proposals June 30, 2015
- Owner evaluation of proposals and selection of finalists July 1-July 10, 2015
- Finalists demonstrations of systems July 14-16, 2015
- Final selection July 17, 2015
- Commissioners public hearing to award contract On or about August 17, 2015
- Contract execution On or about August 17, 2015
- Work begins no later than the first calendar day following contract execution.

4.25 Questions Regarding Scope of Services:

For questions regarding Scope of Services or any other aspect of this RFP, contact:

Susan Hyatt, Senior Buyer
susanh@gjcity.org

SECTION 5.0: PREPARATION AND SUBMITTAL OF PROPOSALS

Submission: Each proposal shall include **One (1) hard copy** and **one (1) electronic copy on USB Flash Drive or CD**, placed in a sealed envelope and marked clearly on the outside “**Electronic Recording, Public Record and Document Storage System RFP-4059-15-SH**”. **The electronic copy shall be an exact reproduction of the original documents provided. All sections shall be combined into a SINGLE ELECTRONIC DOCUMENT.** Offerors are required to indicate their interest in this Project, show their specific experience and address their capability to perform the Scope of Services in the Time Schedule as set forth herein. For proper comparison and evaluation, the Owner requests that proposals be formatted **5.1 to 5.7**. Proposals must contain all of the following information to satisfy the requirements of this RFP:

- 5.1 Cover Letter:** Cover letter shall be provided which explains the Firm’s interest in the project. The letter shall contain the name/address/phone number of the person who will serve as the firm's principal contact person with Owner’s Contract Administrator and shall identify individual(s) who will be authorized to make presentations on behalf of the firm. The statement shall bear the signature of the person having proper authority to make formal commitments on behalf of the firm. By submitting a response to this solicitation the Contractor agrees to all requirements herein.
- 5.2 Qualifications/Experience/Credentials:** Proposers shall provide their qualifications for consideration as a contract provider to the City of Grand Junction/Mesa County and include prior experience in similar projects.
- 5.3 Strategy and Implementation Plan:** Describe your (the firm’s) interpretation of the Owner’s objectives with regard to this RFP. Describe the proposed strategy and/or plan for achieving the objectives of this RFP. The Firm may utilize a written narrative or any other printed technique to demonstrate his/her ability to satisfy the Scope of Services. The narrative should describe a logical progression of tasks and efforts starting with the initial steps or tasks to be accomplished and continuing until all proposed tasks are fully described and the RFP objectives are accomplished. Include a **time schedule** for completion of your firm’s implementation plan and an estimate of time commitments from Owner staff.
- 5.4 References:** A minimum of three (3) **references** with their names, addresses and telephone numbers that can attest to your experience in projects of similar scope and size. Also include a list of all public clients located in Colorado, current and terminated within the last three (3) years.
- 5.5 Fee Proposal:** Provide a complete list of costs using Solicitation Response Form found in Section 7.
- 5.6 Financial Statements:** Proposer shall provide a financial statement, as prepared by a certified public accountant, for their prior fiscal year, consisting of a balance sheet, profit and loss statement and such other financial statements as may be appropriate, which shall demonstrate that the proposer possesses adequate financial ability and stability to enable the Proposer to fulfill their obligations under the terms of this RFP. If requested by the Proposer, such information shall be treated as confidential by the Owner and shall not be subject to public disclosure. These documents must depict the financial status of that entity, subsidiary, division, or subdivision thereof, which will actually provide services. If the Proposer is a partnership or joint venture, individual financial statements must be

submitted for each general partner or joint venture thereof. Consolidated balance sheets and profit/loss statements depicting the financial status of a Parent Corporation or joint venture shall not be considered an acceptable response.

- 5.7 Additional Data (optional):** Provide any additional information that will aid in evaluation of your qualifications with respect to this project.

SECTION 6.0: EVALUATION CRITERIA AND FACTORS

- 6.1 Evaluation:** An evaluation team shall review all responses and select the proposal or proposals that best demonstrate the capability in all aspects to perform the scope of services and possess the integrity and reliability that will ensure good faith performance.
- 6.2 Intent:** Only respondents who meet the qualification criteria will be considered. Therefore, it is imperative that the submitted proposal clearly indicate the firm's ability to provide the services described herein.

Submittal evaluations will be done in accordance with the criteria and procedure defined herein. In addition to county staff, industry stakeholders such as representatives of local title companies, mortgage lenders and real estate law firms may be invited to participate in the evaluation of proposals. Representatives of other governmental entities may be invited to observe the evaluation of proposals and/or any demonstrations of proposed systems. The Owner reserves the right to reject any and all Statements. The following parameters will be used to evaluate the submittals (in no particular order of priority):

- Responsiveness of submittal to the RFP
- Understanding of the project and the objectives
- Experience
- Necessary resources
- Strategy & Implementation Plan
- Required skills
- Demonstrated capability
- Demonstrated business integrity
- References
- Financial Stability
- Fees

The Owner will undertake negotiations with the top rated firm and will not negotiate with lower rated firms unless negotiations with higher rated firms have been unsuccessful and terminated.

- 6.3 Demonstrations and Oral Interviews:** The Owner may invite the most qualified rated proposers to demonstrate their product and participate in oral interviews.
- 6.4 Award:** Firms shall be ranked or disqualified based on the criteria listed in Section 6.2. The Owner reserves the right to consider all of the information submitted and/or oral presentations, if required, in selecting the project Contractor.

SECTION 7.0: SOLICITATION RESPONSE FORM

RFP-4059-15-SH “Electronic Recording, Public Record and Document Storage System”

Offeror must submit entire Form completed, dated and signed.

The undersigned has thoroughly examined the entire Request for Proposals and therefore submits the proposal and schedule of fees and services attached hereto.

This offer is firm and irrevocable for sixty (60) days after the time and date set for receipt of proposals.

The undersigned Offeror agrees to provide services and products in accordance with the terms and conditions contained in this Request for Proposal and as described in the Offeror’s proposal attached hereto; as accepted by the Owner.

Prices in the proposal have not knowingly been disclosed with another provider and will not be prior to award.

- Prices in this proposal have been arrived at independently, without consultation, communication or agreement for the purpose of restricting competition.
- No attempt has been made nor will be to induce any other person or firm to submit a proposal for the purpose of restricting competition.
- The individual signing this proposal certifies that he/she is a legal agent of the offeror, authorized to represent the offeror and is legally responsible for the offer with regard to supporting documentation and prices provided.
- Direct purchases by the City of Grand Junction are tax exempt from Colorado Sales or Use Tax. Tax exempt No. 98-903544. The undersigned certifies that no Federal, State, County or Municipal tax will be added to the above quoted prices.
- Direct purchases by Mesa County are tax exempt from Colorado Sales or Use Tax. Tax exempt #98-04241. The undersigned certifies that no Federal, State, County or Municipal tax will be added to the above quoted prices.
- Prompt payment discount of _____ percent of the net dollar will be offered to the Owner if the invoice is paid within _____ days after the receipt of the invoice. Payment Terms _____.

RECEIPT OF ADDENDA: the undersigned Contractor acknowledges receipt of Addenda to the Solicitation, Specifications, and other Contract Documents.

State number of Addenda received: _____.

It is the responsibility of the Proposer to ensure all Addenda have been received and acknowledged.

Date: _____

Company Name – (Typed or Printed)

Authorized Agent – (Typed or Printed)

Authorized Agent Signature

Title

Address of Offeror

State, and Zip Code

Phone Number

Email Address

Cell Phone Number

SECTION 8.0: Proposal Structure

Use of this Proposal Structure is required or the proposal may be considered unresponsive and therefore disqualified. The Offeror must place and label a major tab between each Part of the Proposal Structure and minor tabs between each sub-part of the proposal structure.

Part 1	Solicitation Submittal
	Cover Letter
	Qualifications/Experience/Credentials
	Strategy and Implementation Plan
	References
	Financial Statements
	Additional Data
Part 2	Solicitation Response Form
	Submit dated and signed form
	Submit Attachment A, Questionnaire
	Submit Attachment B, Submittal Questions
	Submit Attachment C, Pricing
Part 3	Number of Submittals
	One (1) hard copy and one (1) electronic copy of the proposal on a CD or USB drive in PDF format. The electronic copy shall be the official document.

QUESTIONNAIRE

Submit this completed attachment with your proposal. Failure to complete all sections may cause your proposal to be rejected. Responses in this section must be provided in the following format:

Business Need/Highly Desirable

The successful solution should provide a solution for each of the following subsections and items. **Note:** the items listed below are a business need or are highly desirable. The Proposed Solution does not need to specifically confirm to the description given. If it does not, please provide details on how each of these tasks will be accomplished.

Response Code Key

Y – This requirement, feature or service is currently included in the Proposed System at no additional cost.

N – This requirement, feature or service is currently NOT included in the Proposed System and there are no plans to add it at this time.

M – This requirement, feature or service requires modification to the Proposed System or additional cost. Any "M" responses must include estimated cost associated.

Provide any additional information you wish to be considered in the "Details" field or on attached pages which are numbered to correspond with the appropriate question.

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
General System Requirements				
A-1	Does your proposed system run on Mesa County's existing environment which includes Google Apps for Government email and Crystal Reports?			
A-2	Does your proposed system work on the latest software (client OS, server OS, SQL server, etc.) and will it continue to be supported by your firm through the County's software updates?			
A-3	Will regularly scheduled software upgrades (issue fixes and updated functionality) be provided by your firm?			
A-4	Is your proposed system a hosted server model (database offsite with backup/recovery options)?			
A-5	Does your proposed system provide the capability for all existing recorded documents to be accessed by all Recording customers? (Recording customers includes Clerk's staff, other County Departments, the public using our public access terminals and customers who subscribe to online access.)			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-6	Does your proposed system have the ability to have multiple windows (transactions, searches, etc.) open at the same time?			
A-7	Does your proposed system have the capability to convert images from one type of format to another (for example PDF to TIFF)?			
A-8	Does your proposed system have hot key functions in all processes in order to limit the need to use the mouse?			
A-9	Does your proposed system work on a minimum workstation specification below? Windows 7 Professional 64 Bit, Service Pack 1 Intel Core I5 -2400 8GB ram 1GB onboard video Optical TB mouse 19 inch monitor lowest res 800x600			
A-10	Does your proposed system have the capability to accommodate significant increases in workload?			
A-11	Is your proposed software solution capable of operating in a Microsoft Windows SQL Server 2008R2 or above Server Operating System with a SQL server database platform?			
A-12	Does your proposed system provide a modern, easy way, such as available Application Program Interfaces (APIs), to connect/interface to other systems/software?			
Recording/eRecording				
A-13	Does your proposed system provide for recording/e-Recording of documents of all sizes, including large plats and the option to record documents in color, including for documents submitted for recording electronically, via mail delivery or as walk-ins?			
A-14	Does your proposed system provide for all documents, once statutory requirements are verified, to be recorded in the order they are received, imaged, annotated (with recording date, time, assigned reception number, Clerk and Recorder name and fees charged), and cashier fees immediately?			
A-15	Does your proposed system have the capability to record/eRecord and search without going into separate 'modes'?			
A-16	Does your proposed system have the capability to add copies or other fees to a recording transaction without going into a separate transaction type?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-17	Does your proposed system have Quality Assurance review of documents with the ability to enhance or reject the image?			
A-18	Does your proposed system have manual document indexing?			
A-19	Does your proposed system have the capability to use special characters (for example, / and #) in indexing data field?			
A-20	Does your proposed system have the capability to start an indexing data field with a number?			
A-21	Does your proposed system have the capability to back post/index (edit data and images that have reception numbers but have not been indexed) to allow indexing, addition of pages, replacement of pages, and addition of documents without needing vendor to perform these functions?			
A-22	Does your proposed system have the capability to use hot keys in back posting/indexing?			
A-23	Does your proposed system have the capability to change date in back post/index if current year is accidentally entered without needing vendor to perform this function?			
A-24	Does your proposed system have duplicated functionality in back posting as in recording, including hot key functions and copy and paste?			
A-25	Does your proposed system have an internal eRecord function to enable County supported divisions such as Public Trustee, Planning, Clerk to the Board, Treasurer and other Offices or Departments to submit eRecording without a per document fee and without the need to use a 3 rd party eRecord vendor?			
A-26	Does your proposed system have the capability to remove items from suspense queue or marriage license queue, and drop after 30 days or other time period chosen by Owner?			
A-27	Does your proposed system have the ability to import historical images, create an index if it doesn't exist and match up images to existing index (support the format and page count)?			
A-28	Does your proposed system have the blind key verification of key designated indexing fields on any document?			
A-29	Does your proposed system have the ability to have flexible workflows in regards to scanning to support all workflows?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-30	Does your proposed system have Indexing and Verification Queues with the ability to divide and segregate workflows, based on user experience and permissions?			
A-31	Does your proposed system have the capability to pull indexing data from a related document and also another document in same transaction (not just the previous document in transaction)?			
A-32	Does your proposed system have the capability to pull indexing data from document from search result?			
A-33	Does your proposed system have the capability to index and verify from remote location?			
A-34	Does your proposed system have automated index functionality – OCR technology – lasso, grantor/grantee name recognition, and including capability to recognize special characters (for example / and #), etc.?			
A-35	Does your proposed system have the capability to authenticate/certify images electronically with verification that specifies document?			
A-36	Does your proposed system have Artificial Intelligence redaction?			
A-37	Does your proposed system have OCR redaction?			
A-38	Does your proposed system support PRIA eRecording models and XML standards?			
A-39	Does your proposed system have a print management system that: ensures accuracy, tracks the numbers of prints and charges for each page on a per-customer basis and offers the ability to use a "shopping cart" functionality?			
A-40	Does your proposed system have a Self-service print/search kiosk?			
A-41	Does your proposed system have bulk FTP or SFTP exports and hosting (data and image extracts)?			
A-42	Does your proposed system have an Integrated eRecording feature/module/interface with eRecording submitters and vendors, current and future? (Please provide a list of currently supported vendors);			
A-43	Does your proposed system provide support for multiple record books with independent reception numbers and the ability to create/add new record books and reception number configurations?			
A-44	Does your proposed system have the ability to configure and update the Recording Stamp?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-45	Does your proposed system have the ability to add an electronic recording stamp to paper documents rather than a label?			
A-46	Does your proposed system have the ability to make entire images confidential, indicate to viewers that an image is confidential by displaying a generic splash page in place of the image?			
A-47	Does your proposed system have the ability to insert blank and fill pages for voided documents or reception number not used?			
A-48	Does your proposed system have the capability to create multiple legal descriptions (subdivisions, lots, blocks, sections, townships and ranges) with a single entry?			
A-49	Does your proposed system have the capability to create alpha codes for frequently used grantors/grantees and mailing addresses?			
A-50	Does your proposed system have the capability to place a hold on a problem transaction which will enable staff to continue to progress with items in queues?			
A-51	Does your proposed system have the ability to doc link to reception number?			
A-52	Does your proposed system have search criteria capabilities which allow for search on any combination of grantor, grantee, first name, address, doc legal, remarks, doc type, document type, record date, sale price, soundex, wildcards (internal & web search)?			
A-53	Does your proposed system have search results capabilities which allow sorting, additional filters, distinct result per reception number, etc. (both internal and web search)?			
A-54	Does your proposed system have the capability to add redactions to images?			
A-55	Does your proposed system have the capability to add annotations to images?			
A-56	Does your proposed system have the capability to import and export images?			
A-57	Does your proposed system have a web presentation where identified subscribers can 1) view a watermarked document without permitting printing or downloading, and 2) purchase the document without the watermark using a credit card or escrow account?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-58	Does your proposed system have a web presentation which allows users to search all available meta data for documents?			
A-59	Does your proposed system have online search and retrieval available to customers and Clerk's staff 24 hours a day, seven days per week?			
A-60	Does your proposed system have the capability to extract archive images and indices (or metadata) either on a scheduled or ad hoc basis?			
A-61	Does your proposed system have the ability to integrate with SIRE for grantor/grantee indices?			
A-62	Does your proposed system provide support for searchable PDF file formats?			
A-63	Does your proposed system have the capability that allows multiple locations to record simultaneously?			
Marriage Licenses and Civil Unions				
A-64	Does your proposed system have the ability to issue marriage and civil union licenses?			
A-65	Does your proposed system have the ability to scan marriage and civil union licenses including the ability to scan and attach supporting marriage or civil union license documents as part of the official marriage or civil union license record?			
A-66	Does your proposed system have the ability to record marriage or civil union licenses?			
A-67	Does your proposed system have the ability to have a rush status or workflow for marriage or civil union licenses processing?			
A-68	Does your proposed system have the ability to search marriage or civil union licenses by a variety of criteria including gender and proxy?			
A-69	Does your proposed system have a web presentation which allows applicants to enter their non-sensitive information into an online application, either from a kiosk in a Clerk and Recorder office location or from offsite (such as from home), which data can be uploaded to complete marriage or civil union forms?			
A-70	Does your proposed system have the ability for multiple Clerk's office locations to issue licenses simultaneously?			
Data and Image Conversion and Maintenance				
A-71	Does your proposed solution have the ability to house/archive all existing & future data and images with the ability for Clerk's staff, customers and public to access all existing and future images?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-72	Does your proposed system provide a comprehensive data and image conversion plan?			
Printing				
A-73	Does your proposed system have the capability to allow clerks to selectively and easily change print properties on documents to be printed (printer, page size, duplex, etc.)?			
A-74	Are the printers for your proposed system able to produce the reports referred to in this RFP, as well as able to produce reception receipts, copies of documents through the proposed imaging system, marriage licenses, reception number labels with bar code and necessary labels for returning documents to customers?			
Emailing				
A-75	Does your proposed system have the capability to allow clerks to email documents directly from the system (does not require document to first be printed to PDF, then attached to an email)?			
Reports and Data Tracking				
A-76	Does your proposed system provide a robust collection of canned operational and financial reports, typically all those needed on a regular basis for management?			
A-77	Does your proposed system have a strong analysis/modeling tools that can be customized by Owner for operational and strategic decision making?			
A-78	Does your proposed system have the ad-hoc reporting capabilities, including the capability for clerks to add to, modify and design reports without vendor assistance?			
A-79	Does your proposed system have the ability to track and report transactions completed, customer wait times, and amount of time spent per transaction type, sorted by transaction type, person providing service, etc.?			
Payment Management, Financials				
A-80	Does your proposed system have auto-pay capability with eCommerce option which would allow customers to subscribe to the system without the need for Owner to send customers an invoice?			
A-81	Does your proposed system have an internal accounting/invoicing system – issues invoices, tracks charges and payments?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-82	Does your proposed system have the ability to receipt all revenues, including monies for services other than Recorder functions, such as passports, copies and data from other Divisions, such as Elections, etc.?			
A-83	Does your proposed system provide support for many account types and payment options, such as: --Cash; --Check; --Credit Cards; --Drawdown accounts; --ACH accounts; --Escrow accounts; --E-commerce functions?			
A-84	Does your proposed system have cash drawer management?			
A-85	Does your proposed system have cash balancing on individual basis for each cashier?			
A-86	Does your proposed system have the ability to integrate with Colorado.gov Payport solution?			
A-87	Does your proposed system have general ledger account association with all transaction types based upon Generally Accepted Accounting Principles?			
A-88	Does your proposed system have the ability to endorse and scan checks?			
A-89	Does your proposed system have the ability to have web searchers select and pay for documents via credit or debit card online without clerk interaction (shopping cart functionality)?			
A-90	Does your proposed system have flexible options to charge online web access customers?			
A-91	Does your proposed system have the ability to revise transaction information at a later date (for over- and under-collects) – while still allowing transaction to remain associated to the original business date?			
A-92	Does your proposed system have the ability to set amounts for overages to create refund paperwork and reports?			
A-93	Does your proposed system's accounting, payment and financial functions integrate with County's electronic accounting software (Tyler Technologies, Eden Financial Software)?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
Security and Auditing				
A-94	Does your proposed system provide support of security roles to provide appropriate user access and control, both for internal recording system and external web site presentations?			
A-95	Does your proposed system have the ability to audit data and document changes for error correction, fraud detection, and general management?			
A-96	Does your proposed system have security roles which prevent the retention of credit card information and protect other sensitive data that may be gathered during normal business operations (dates of birth, social security numbers, etc.)?			
Vendor Remote Access				
A-97	Under your proposal, will all remote access sessions be coordinated through the County IT and/or the Clerk and Recorder's designated agent?			
Mortgage Fraud Prevention				
A-98	Does your proposed system have the capability for grantor/grantee to receive an automated notification of filing of document containing their name and/or address?			
Solutions for Associated Offices/Departments				
A-99	Does your proposed system have the capability to integrate with Tyler Technologies, Eagle Assessor Software system for transfer of data or records impacting land ownership?			
A-100	Does your proposed system have a view specific to Assessor Office needs?			
A-101	Does your proposed system have a view specific to Public Trustee needs?			
Service and Support				
A-102	Does your proposed system have a Service Level Agreement with guaranteed response/resolution times and a statement indicating your company will support its software under future versions of Microsoft Server for the duration of the relationship between Owner and Offeror?			
A-103	Does your proposed system have a support/ticket system that allows clerks and IT staff to check progress of tickets online?			
(Future Options) Enterprise Document Workflow Management				
A-104	Does the proposed system include an Enterprise Document Workflow Management solution?			

Question	Requirement, Feature or Service	Response Code	If "M", include cost	Details
A-105	Does the proposed system provide an Electronic Planning and Development Application submittal, review and collaboration tool with online submission portal, configurable forms, and state of the art viewer capabilities?			
A-106	Does the proposed system provide for Agenda and Minutes Workflow Management with online postings and video recordings?			
Training				
A-107	Does your proposed system provide training at various levels to Clerk and Recorder staff and stakeholders including: --Administrator (Advanced to Expert) --Power User (Intermediate to Advanced) --End User (Beginning to Intermediate)?			
A-108	Does your proposed system provide appropriate training materials, manuals and tools?			
A-109	Can you provide application training for up to twenty (20) people?			

ATTACHMENT B, "Submittal Questions"

SUBMITTAL QUESTIONS

B. Submittal Questions – In addition to the information required by section 5.0, proposals must include detailed narrative responses regarding each of the following questions, and be numbered to correspond with the appropriate question. Include any major or minor items of information not specifically mentioned but which would normally and reasonably be provided. Be advised that the greater the degree of specificity, the more likely it will be for the Clerk to review your response favorably. Incomplete submissions may cause your proposal to be rejected.

Question	Requirement
B-1	Any additional comments your firm would like considered regarding your responses in all subsections of Attachment A – Questionnaire.
B-2	Provide a summary of your proposed system including, but not limited to how the proposed system will meet each of the Clerk's core goals of security, privacy, accuracy, priority/sequencing of recording, online access, standardization and preservation.
B-3	Describe your firm's interpretation of the Owner's objectives with regard to this RFP.
B-4	Provide a minimum of three (3) references with their names, addresses and telephone numbers that can attest to your experience in projects of similar scope and size.
B-5	Provide a list of all public clients located in Colorado, current and terminated within the last three (3) years.
B-6	Provide a complete description of your firm including: a. Number of years your firm has been in business; b. How many years your firm has been a service provider, c. Number of years your firm has been doing business in Colorado; and d. Prior experience your firm has had with similar projects.
B-7	Provide a narrative and/or list of accomplishments on similar installations of the proposed system.
B-8	Provide copies of all contract/software/license documents that the County would be expected to sign if your proposed system is chosen as a result of this RFP.
B-9	Provide resumes and copies of certifications for your staff who will be involved in data conversion, project management, and other aspects of the implementation of the proposed system if your firm is chosen as a result of this RFP.
B-10	Provide a detailed description of software, hardware and licenses requirements for the proposed system.
B-11	Provide a detailed description of system requirements for workstations proposed in the system including any prerequisite software.
B-12	Provide a detailed description of the image creation/storage in your proposed solution including database technology used, image and data storage methodology.

Question	Requirement
B-13	<p>Provide a detailed description of the project plan and process for data and image conversion including a minimum of the following:</p> <ul style="list-style-type: none"> a. The automated conversion programming used to significantly reduce data conversion labor; b. The conversion verification logic and/or process used to confirm the accuracy of the conversion of all data and images; c. The conversion data mapping scheme you anticipate using that identifies any data parsing, concatenation, format changes, etc.; d. The conversion timeline expectations, deliverables, and accountability; e. The conversion testing methodology and your expectations for work that will be performed by the County; f. The roles and responsibilities of Mesa County for the image/data conversion effort including timing requirements and County resources required; g. The plan for identifying and handling exceptions identified in the source data and/or images; h. The plan for training of users; and i. The description of your solution’s workflow management and business operations support, including customer support.
B-14	<p>Describe your firm’s prior experience with the conversion of data accessed by the Clerk’s current application (Harris Aptitude OnCore Recording Solutions). Please include references for the project(s).</p>
B-15	<p>Provide your definition of a successful data and image conversion.</p>
B-16	<p>Provide a detailed description of your guarantee of conversion services performed.</p>
B-17	<p>Provide an explanation of how your proposed system accommodates security of public access to the records separately from the process of recording these documents.</p>
B-18	<p>Provide a detailed description of the OCR indexing and redaction features of your proposed solution. If applicable, please provide a list of all automated OCR indexing and redaction vendors that your proposed solution is able to integrate with.</p>
B-19	<p>Provide a detailed description of your firm’s methodology for testing and certifying all current and future eRecording submitters.</p>
B-20	<p>Describe the technology used by your proposed system’s search engine for “sounds-like” and “smart” searches.</p>
B-21	<p>Provide a detailed description of the existing integration, or development thereof, between your proposed solution and the Offices of the Assessor, Public Trustee and Treasurer.</p>
B-22	<p>Provide a detailed description of how your proposed solution integrates, or will integrate, with the county’s Tyler Technologies, Eden Financial software system.</p>
B-23	<p>List the different forms of payment your proposed solution is able to accept and process.</p>
B-24	<p>Provide a detailed explanation of the credit/debit card solution used by your proposed solution, including confirmation that your proposed solution does not retain or maintain credit/debit card information at any time.</p>
B-25	<p>Provide a detailed description of your proposed solution’s utilization of pre-paid/escrow accounts. Please note: the ability for customers to add escrow monies to an existing account or establish a new account online with no interaction from the Clerk’s office is highly desirable.</p>

Question	Requirement
B-26	Provide a description of your proposed solution's utilization of ACH payments including the type ACH (debit/credit), and the types of transactions that ACH payments can be accepted for. Please note: the Clerk's Office currently utilizes ACH Debit only for payment on eRecordings, escrow deposits, and other miscellaneous transactions. ACH Credit is not desirable and not preferable.
B-27	Provide a description of your proposed solutions's utilization of credit card payments (debit/credit), and the types of transactions that credit card payments can be accepted for.
B-28	Describe the methodology used by your proposed solution to offer eCommerce allowing customers to purchase copies of records and/or other services online with little or no interaction from Clerk's staff.
B-29	Provide an overview of your proposed solution's financial operation detailing features such as data capture, storage, retrieval, ad hoc reporting and how daily, weekly, monthly and annual balancing and ledger financials are produced and reported, along with how error corrections are made and tracked per transaction.
B-30	Provide a detailed description of the process and costs to modify your system and/or forms due to revisions to Colorado State statute or Clerk mandates.
B-31	Explain the methodology your firm uses to make modifications to all aspects of marriage and civil union application and licensing in order to comply with requirements set by statute or the Colorado Department of Public Health and Environment (CDPHE). Please note: the ability for the Clerk's Office to make updates/modifications to all aspects of marriage and civil union application and licensing with no assistance from the vendor is preferable.
B-32	Provide a detailed description of your proposal's approach for Recording system monitoring, management, maintenance and upgrades.
B-33	Provide a detailed description of your proposed system's server needs, including all software, hardware and licenses as a separate part of the proposal. Licenses and Proprietary costs must be indicated in the cost/fee proposal. Proposals should include licensing for 3 separate environments; Production; Test and Development Systems.
B-34	Provide a detailed description of your proposed system's minimum workstation needs, paying particular attention to the requirements for monitor size and resolution.
B-35	Provide a detailed list of any additional hardware requirements needed to meet your software specifications.
B-36	Provide a detailed description of software used for your proposed system's method of capturing images.
B-37	Provide a detailed description of your system's proposed maintenance plan application and SQL servers involved in the proposed system, including points of dynamic data which need to be included in a data backup plan.
B-38	Provide a detailed description of system requirements for servers proposed in the system including prerequisites such as server roles and features.

Question	Requirement
B-39	<p>For each of the functional options for your proposed system, provide a cost and time estimate for both in-house hosted and cloud based solutions: Option 1 – In-house, hardware provided by Mesa County. Specify: --Minimum server requirements --Recommended server requirements --Are virtualized servers acceptable --Operating System requirements --Database requirements --Workstation requirements hardware, operating systems(s) --Type of access needed for support Option 2 – Cloud bases system (SaaS) Specify: --Location --Bandwidth requirements (based on number of users) --Storage location(s) --Security, redundancy and backup procedures</p>
B-40	<p>For both cloud and onsite solutions, provide a detailed description of: --Sample Gantt chart --Pre-project meeting and information gathering requirements --Project plan, documentation and approval process --Development process --Testing phase --Training phase --Go-live phase --Post live support and development --Dedicated staff for Offeror --Dedicated staff/staff involvement for County --Ongoing support and upgrade process</p>
B-41	<p>Describe the application release schedule for your proposed system including a minimum of the following:</p> <ol style="list-style-type: none"> a. Timeframe between major version releases; b. Timeframe between minor version releases; c. Do you release pat updates? If yes, how often? d. Do you perform emergency bug fixes? If yes, describe expected turnaround time and methodology of releasing these fixes? e. What costs are associated with each of the above release types?
B-42	<p>Describe the documentation and deliverables for the project management process for implementation of your proposed system, including detailed setup documentation, technical design documentation, and testing results.</p>
B-43	<p>Describe your firm’s plans for significant software, database, version, and/or architectural changes for future releases of your proposed system as they are currently understood.</p>
B-44	<p>Provide a list of currently supported vendors for your system’s Integrated eRecording feature/module/interface with eRecording submitters and vendors.</p>
B-45	<p>Provide a full list of all pre-designed operational and financial reports available within your proposed system with a brief description of the purpose of each report.</p>
B-46	<p>Provide a detailed description of the report scheduling capabilities, report on-demand execution, and report delivery methods.</p>

Question	Requirement
B-47	Provide details of the process for the Clerk's staff to access your proposed solution and write their own reports in-house using Crystal Reports or other similar business intelligence application.
B-48	Describe any and all remote access requirements for your system implementation and system maintenance.
B-49	Provide a detailed description of how your proposed solution connects/interfaces [such as available Application Program Interfaces, (APIs)] to other systems/software, including Tyler Technologies Eden Financial software and future financial software used by Mesa County, and GIS (ESRI).
B-50	Provide a detailed description of your proposed training program including length of time, location of trainings, overview of subject matter to be covered and background/recording experience of trainers. Include a training option/plan for online or tutorial based training that will accommodate ongoing training needs relating to staff refresher training, and staff and end user turnover. Include a list of all user guides, training manuals, or other documentation that would be provided to the Clerk if your firm is chosen as a result of this RFP.
B-51	Describe your firm's use of user groups for support across your customer base, and provide details on how information and best practices are shared.
B-52	<p>Provide a detailed description of the customer support available to the Clerk and Recorder and County IT staff if your firm is chosen as a result of this RFP. The description should include, but not be limited to the following:</p> <ol style="list-style-type: none"> a. The minimum number of first-level support staff available to assist the Clerk staff and/or IT staff at any given time; b. The minimum number of upper-tier support staff available to assist the Clerk staff or IT staff at any given time; c. Statistics regarding your average time between incident reports and full resolution; d. Method of reporting incidents (phone, online, remote access to workstation, on-site, etc.) e. Your firm's support staff hours of operation; f. Additional costs of customer support; g. Your firm's process for determining incident urgency/resolution times; h. Your firm's process for escalation of incidents if resolution is not immediately found; i. Your firm's process for installation of break/fix changes to the proposed system; j. Your firm's process for installation of bug fixes to the proposed system; k. Your firm's process for troubleshooting issues experienced by the public, website users, or any other customers of the Clerk and Recorder.
B-53	Describe any significant service disruptions experienced at your location or in the office of your customers in the last five years. Also indicate whether this disruption was the result of your process/system/configuration failure or through customer software/hardware failure and describe how the service disruption was resolved.

Question	Requirement
B-54	Describe how your proposed system ensures the protection of all data when: <ul style="list-style-type: none"> a. At rest in a file system, database, or other storage whether temporary or permanent; b. In flight transmitted over LAN, WAN, Internet, wireless or other mechanism for transporting data from one system to another; and c. Being entered into the system including masking data when appropriate and not displaying any sensitive data unless required.
B-55	Provide information on the physical location of any and all systems that would contain Clerk data if your proposed system is chosen as a result of this RFP. This description should include the technical and physical security in place for the protection of access to these systems.
B-56	Provide a detailed description of the processes for obtaining and revoking access permissions to Clerk data for current employees of the vendor as well as any contracted third parties. This may include background checks, user acceptance by signature of standards/requirements, user adherence to required trainings, standards, and protection of access by former and non-employees.
B-57	Provide a list of any software, systems, and types of user access that would be required of the County in order to satisfy security requirements for the system.
B-58	Provide a description of the responsibility and liability the vendor takes for the security and integrity of the data while in transmission, housed in the data repositories, and manipulated by the hosted application.
B-59	Provide a detailed description of the methodology for managing security breaches or issues involving any component of the hosted architecture, and how your firm will report such breaches immediately to the Clerk and Recorder. This includes, but is not limited to, security issues to the vendor's data center(s) and data transmission mechanisms.
B-60	Describe the means by which user accounts and access are managed by your proposed system, including but not limited to: <ul style="list-style-type: none"> a. Desktop application(s) b. Web application(s) c. Application service(s)
B-61	Describe the level of access, security roles, and connection methodology required by your firm to the County's network for the following: <ul style="list-style-type: none"> a. Installation; b. Ongoing support c. Server access d. End-user desktop access
B-62	Describe your proposed system's auditing capabilities to verify data integrity and end-user access of data.
B-63	Describe local user security requirements for installation or execution of any client software installed on end-user desktops.
B-64	Describe your firm's participation in development and adherence to PRIA xml standards for eRecording.
B-65	Provide any additional information that you consider applicable that you would like reviewed during the Clerk's consideration of your proposal.

PRICING

C. Fee Schedule –Proposals must include detailed narrative responses regarding each of the following questions, and be numbered to correspond with the appropriate question. All proposals shall include **all** pricing information relative to delivering the live system and performing the work required for setup, image conversion and ongoing use as described below. **Please provide scalable pricing options for small, medium and large jurisdictions.** The Offeror should describe in its proposal how it defines a small, medium and large county. Failure to provide all information may cause your proposal to be rejected.

Question	Requirement
C-1	Provide a detailed description and example of your current pricing model separating all features/modules and whether or not they are billed inclusively or exclusively.
C-2	Provide an estimate of total cost of ownership for a period of ten (10) years.
C-3	<p>For each of the functional options, provide a cost and time estimate for both in-house hosted and cloud based solutions. Option 1 – In-house, hardware provided by the County. Option 2 – Cloud based system (SaaS)</p> <p>Detail all potential costs for your proposed system and/or separate modules including, but not limited to, the following:</p> <ul style="list-style-type: none"> • Software and technical support costs • Annual maintenance costs • Data conversion costs • Upgrade costs • Licensing costs • Initial implementation <ul style="list-style-type: none"> ○ Installation ○ Configuration ○ Deployment ○ Enhancements ○ Integrations ○ Hardware ○ Software ○ Connectivity • Incremental support costs such as break/fix costs, etc. • Development costs for mandatory changes due to revisions in statute or other required mandates • Travel related expenses including but not limited to airfare, hotel, per-diem and hourly rate
C-4	Provide separate pricing information, including all information referenced in questions C-1 through C-3 for the following items described in section 4.19: --Future Enterprise Document Workflow Management Expansion --Solution for Planning and Development Application Submittal and Review --Solution for Agenda and Minutes Workflow Management and online postings of documents and video.
C-5	Provide information on payment structure such as full payments, leases, amortization of costs, etc., and the discounts available for each, if applicable.