



COUNTY OF INYO

REQUEST FOR PROPOSALS

RFP

Clerk-Recorder Software System

February 16, 2021

SUBMIT PROPOSALS TO:

**Inyo County Board Clerk
RFP- Clerk-Recorder Software System
P.O. Box Drawer N
Independence, CA 93526**

SECTION 1: INTRODUCTION

1.1 Proposal Goals

General Summary

The County of Inyo is requesting proposals from qualified bidders to provide computer software and hardware, implementation services and ongoing maintenance, and support for a complete Clerk-Recorder's Office software and hardware system to replace the current applications. The new software system is expected to provide functionality in all areas within the office and be a complete replacement and upgrade of the existing system. The system must comply with all Federal, State and local laws and ordinances as well as Government Accounting Standards Board (GASB) fiscal management standards, the National Institute of Standards and Technology (NIST), and other appropriate technology related compliance and standards based on the data types, and provide the capability to electronically integrate with other business systems. The County anticipates entering into a five (5) year contract with the successful firm.

Technical Summary

The County of Inyo is seeking proposals for a new Clerk-Recorder software and hardware solution. The selected Respondent shall provide software support, hardware support, training, maintenance, warranties and include associated costs in the proposal. The information provided by Respondents through this RFP will be evaluated and used in the selection of the County's new Clerk-Recorder software and hardware system.

The County requests that all respondents propose a complete solution that clearly describes and defines required and optional hardware, software and implementation services.

1.2 About the Organization

The County of Inyo is a governmental organization

The Inyo County Clerk/Recorder's Office (County) has used the same integrated Clerk/Recorder software system since 2000. The vendor which originally supplied this product has been sold and will not be supporting this software at the end of the current contract, which is set to expire 6/30/2021. A new complete software system must be purchased and implemented immediately.

This department is comprised of 3 separate offices; the Recorder, the County Clerk and the Register of Voters. We have a staff of 4 permanent full-time equivalent staff positions and 1 temporary full-time equivalent staff position, including the department head, each with a computer terminal. The County has two computer terminals used by the entire staff for counter service, one computer terminal for scanning and two computer terminals for public research. The County Assessor and four private companies received nightly FTP transfers of the public version of Official Records once indexed and verified. The Public is provided an Official Record search via web access.

Inyo County has a population of just over 18,000 people with an average of 4,000 documents recorded each year. The office issues approximately 150 Marriage Licenses annually, nearly 1500 certified copies of vital records and registers about 500 birth, death and marriage records. The software system must also support Notary Filings and Oaths of Office. The software solution must also have a robust cashiering and financial reporting function to support over 100 different types of services, two separate accounting budgets and over 15 different trust accounts.

While the County is small, the office has the same responsibilities and requirements of any large county and therefore must have all of the same functionality in a complete software system. The County desires to utilize hardware that would allow for printed stickers or an ability to otherwise “stamp” required information onto recorded official record document and produce printed receipts for customers. The software system must also include the ability to redact social security numbers and suppress DD-214 documents from public viewing.

Finally, it is the desire of the Inyo County Clerk-Recorder’s office to implement e-recording and Government to Government recording services; a service not currently offered in Inyo County.

Inyo County is a slow growth area

Less than 2% of the land in Inyo County is privately held. The City of Los Angeles Department of Water and Power and the Federal Government own the larger balance of land in the county. Lacking land available for expansion, very little growth in population and demand for services is anticipated in the immediate future.

1.3 Issuing Agent

Project Sponsor

This project is governed by the County of Inyo Technology Initiative Policy. The Inyo County Elections Department is sponsoring and managing this project in conjunction with the Inyo County Information Services Department. Respondents are specifically instructed to NOT contact any elected officials or County employees for meetings, conferences or technical discussions related to the RFP, excepting the Inyo County Clerk/Recorder & Registrar of Voters, Kammi Foote, who is the project sponsor. Unauthorized contact with elected officials or County personnel may result in rejection of the respondent’s RFP response. All communications with the County regarding this RFP (other than the formal submittal) should be via email and directed to:

Kammi Foote, kfoote@inyocounty.us

1.4

Current Environment

Current Clerk-Recorder System was purchased in 2000

Inyo County’s current Clerk-Recorder system was purchased from Atpac/Criis in 2000, which was subsequently acquired by Granicus. The Clerk-Recorder system includes a server and a redaction server that physically resides on-site and is maintained by the Information Services Department. The system is networked to seven personal computers and one scanner/image server.

1.5 Technology Vision

The County wishes to implement updated technology to support all cashiering needs, produce robust accounting records and maintain the permanent image record of all birth, death, marriage, land, Notary oaths, oaths of offices and other professional filings, along with associated indices.

SECTION 2: FUNCTIONAL REQUIREMENTS

2.1 Scope of Work/Services

RESPONDENT RESPONSIBILITIES

- Provide all professional service required for installation, configuration and setup.
- Work with County IT staff to install and configure software and hardware on County network, clearly defining scope of responsibilities in proposal.
- Identify ongoing support that County IT will be responsible for post implementation.
- Include appropriate data backup solutions.
- Identify any data backup requirements not included in the proposal.
- Ensure appropriate technology related compliance and standards, including NIST.
- Include encryption of data at rest and in transit, reference FIPS. The FIPS-199 security category (SC) of each dataset may differ therefore, if all data sets are to be contained in the same system/database, use the security category for the most restricted data included.

TYPE OF RECORD	SECURITY OBJECTIVE	INTEGRITY	AVAILABILITY
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Vital Records	High	High	Moderate
Official Records	High	High	Moderate
Public Records	Moderate	Moderate	Moderate
All Clerk Filings	Moderate	Moderate	Moderate

- Identify system architecture of solution including any Respondent hosted components, physical and virtual systems, and including network diagrams.
- Provide initial support and training.
- Ensure the County functions continually throughout the process during business hours.
- Convert and migrate all data from the existing applications.

Current Database Information:

- Database structure is comprised of C-ISAM databases
- Total of approximately 37 individual databases with collective size of 1 GB
- Currently have 448,873 document image files, using 54 GB of disk space
System is hosted on Inyo-CRiis server 172.16.11.21
- RedHat Enterprise Linux 5.9 with application/database services provided through a CRiis software application (Version 4.3.3.41) is created/maintained by Granicus (AtPac/SouthTech/Granicus)
- The framework/runtime platform is Cyberscience (version 7.30_3a)
- Types of images - Tiff 4.
- Identify & itemize any "customized" portions required for County business practices.
- Include a Respondent hosted Public Record index search for the County website
- Identify & itemize all licensing fees required for full use of the new solution.
- Any software included in the proposed solution must be legally licensed including all client/device access licenses.
- Identify & itemize fees (or fee structure) associated with future updates and upgrades required for full use of the new software applications.
- Identify any software and hardware dependencies in the proposal; this is to include any software and hardware that is not included as part of the proposed solution of which the

proposed solution is dependent.

- Identify any connectivity and data transfer requirements.
- Software must remain compatible & supported with the current version or one revision removed of other software of a standard desktop or that the solution relies on, such as: Microsoft Windows, Microsoft Office, Internet Explorer, Adobe Acrobat, Chrome, etc.
- Provide a SLA, identifying staff availability and time frame responsiveness for trouble shooting (ie helpdesk)
- Satisfy availability of all County functions listed in the following table(s)
- Identify & itemize all Software and Hardware required for this proposal. Respondent shall list all existing equipment that will be used and all new equipment to support the Respondent's system.

Definitions: **Official Records** are documents recording into a public repository that primary affect land transaction

Vital Records are Birth, Death & Marriage records

County Clerk	
Marriage	Issuance of licenses, amendments & duplicates Search & retrieval of issued licenses
Notary Oaths & Authentication	Registration of Notary Oaths Search & retrieval of registrations for authentication
Professional Registrations	Registrations & search & retrieval of the following: Process Servers Legal Document Assistants Unlawful Detainer Assistants Professional Photocopiers
Power of Attorney	Filing of POA's Search & retrieval of filings
Roster of Public Agencies	Filing of Roster Search & retrieval of filings
Oath of Office	Filing of all Oaths of Office including Deputy Commissioner of Civil Marriages Search & retrieval of filings
Cashiering	Cashiering/Reconciliation/ Accounting and distribution of all Clerk Fees collected

County Recorder	
Recording	Recording of all Official Records & Filing of 20 Day Notices E-recording that meets California Department of Justice standards and facilitates government to government transactions

Document Scanning	Scanning of all documents, including Official Records and Vital Records
Redaction	Redaction of social security numbers on Official Records, transmission of redacted images into a workspace for data entry/verification & public research in house
Indexing/Data Entry & Verification	Enter an index of all Official Records and Vital Records that can be verified by a second user, which creates a searchable index.
Official Records Including a Public Version	Search & retrieval of all records including public research of Official Records. Issuance of copies & certified copies of Official Records Internet Search of Official Records Index
Vital Records	Marriage Registration Search, retrieval & issuance of certified copies of Birth, Death & Marriage records
Cashiering	Cashiering/Reconciliation/ Accounting and distribution of all Recorder Fees collected
Elections	
Cashiering	Cashiering/Reconciliation/ Accounting and distribution of all Election Fees collected

SECTION 3: PROPOSAL INSTRUCTIONS

3.1 General Conditions

Proposal Cost

Those submitting proposals do so entirely at their expense. There is no expressed or implied responsibility on the part of the County of Inyo to reimburse respondents for any expenses incurred for preparing or submitting proposals, providing additional information when requested by the County of Inyo, or participating in any selection interviews.

Basis of Selection

The County reserves the right to reject any and all Proposals, or any part of a Proposal. The County reserves the right to waive variations from the specifications that do not render a Proposal non-conforming. The County retains the right to disregard non-conformities, non-responsive Proposals or conditional Proposals in the best interest of the County.

In evaluating Proposals, the County shall consider the qualifications of the Proposers and whether or not the Proposals comply with the prescribed requirements of the Proposal Documents as specified in this RFP.

The County may consider the qualifications and experience of Proposers and the type of training for Clerk-Recorder employees can expect to be provided by a Proposer, suitability for use by the County and hardware and software, including materials and equipment.

The County may conduct such investigations, as it deems necessary to assist in the evaluation of any Proposal and to establish the responsibility, qualifications, and financial ability of the Proposers, proposed subcontractors, and other persons or organizations to do the Work in accordance with the proposed contract and requirements of this RFP to the County's satisfaction within the prescribed time.

The County reserves the right to reject the Proposal of any Proposer who does not pass any such evaluation described in this section by the County to the County's satisfaction.

If a contract is awarded to a Proposer as a result of this RFP, it will be awarded to the lowest, conforming responsible Proposer that best meets the requirements of the County and the Clerk-Recorder, in the sole judgment of the County.

Any Proposal must remain valid for ninety (90) days after the date of receipt of Proposals. Proposers are encouraged to offer a longer term for how long the proposal is guaranteed, and should state so in writing. If a contract is to be awarded to a Proposer as a result of this RFP, the County will issue the Notice of Award to the successful Proposer within the longer of ninety (90) days after the date of receipt of Proposals, or the time period the Proposer guarantees. The County reserves the right to return all Proposals, not make any awards, and cancel the project and this RFP, or to reject all Proposals and resolicit for proposals or not, at the County's option.

Criteria for ranking are as follows:

1. Proposer must state in writing within the Proposal submission that all proposed equipment and software has or will be in operational no later than June 30, 2021. In the event that Proposer fails to meet this requirement after award is made, award may be rescinded, and the County will not be liable for any costs, demands, claims, or any other charges or associated costs incurred by the Proposer. The County may also recoup liquidated damages pursuant to its contract with the Proposer.
2. Proposer must state in writing whether they are able to provide annual maintenance and software license after the initial warranty and software license expires and provide the cost related to the annual maintenance and license.
3. Proposer must state in writing whether they are able to provide instruction and training for Inyo County Clerk-Recorder employees and state the cost for the service.
4. Proposer must state in writing the amount of telephone support that it will provide for its equipment, the limits upon such support and the cost related to the support.
5. Proposer shall state in writing a complete description of its system hardware and software, what products are included with the system hardware and software and the price for the described hardware/software. The price shall include all accessories necessary to fully utilize the system as well as a description of each accessory and price for each item.
6. Proposer shall state in writing whether the Proposal includes the price for any and all servers for the system use.
7. Proposer shall state in writing the time frame for initial hardware warranty and software license.
8. Proposer shall state in writing in detail the process the Proposer will utilize to convert all existing data and images into their proposed software system.
9. Proposer shall state in writing and in detail the amount and cost of field support training.
10. Proposer shall state in writing if its proposed hardware and software are compatible with any other proprietary or non-proprietary (including off-the-shelf) hardware and/software, or if it can and the Proposer is willing to make it compatible. The cost, if any, of modifying or using other hardware/software shall be identified, as well and any disclosures regarding compliance with State and Federal elections laws.

Selection Criteria

The selection criteria listed below represent critical issues that will impact the success of the new Clerk-Recorder software and hardware system. The respondent should make certain that their proposal addresses each of these issues. Each numbered item below requires a response.

1. Provide organization's or firm's legal name and address.
2. Provide the name, title, address, telephone number, and email address of the person(s) who will serve as the contact(s) for the County as well as those persons having the ability to represent and make binding decisions on the organization and firm.
3. Provide a letter of introduction with a brief description of the organization or firm, including organizational structure and experience in the industry.

4. Provide a summary of the products and services offered, including annual license fees, annual support fees, and/or annual subscription fees. Include third party applications that are being recommended. List prices are acceptable.
5. Describe any related services that the organization or firm offers, including, without limitation, integration assistance, training, and ongoing support. Provide a rate structure or other costing information (i.e. hourly rate or pricing methodology) for the professional services offering. List prices are acceptable.
6. Describe the manner in which the organizations product(s) will support the County.
7. Describe the different implementation approaches (i.e. big bang vs phased roll out) that the organization or firm can offer to the County of Inyo to fully implement a particular solution. Include the benefits and/or risks of each.
8. Provide a brief description of the overall software and architectural design of applicable products.
9. Describe the recommended operating environment(s) required to install and use any relevant systems and the minimum system requirements necessary to run such systems. Include any suggested production, development/test, and disaster recovery environments.
10. Describe how the organization or firm envisions its software and hardware solutions changing over the next five to ten years.
11. If applicable, submit at least two (2) references of local governments equal in size or larger than the County of Inyo that have implemented the proposed system, or, a similar system, within the last five (5) years. Include: a. Name of the client b. Contact information (name, address, phone, email) c. Date system fully implemented d. Total # of employees e. Technical environment, i.e. commercial off-the-shelf (COTS), proprietary, mixture of COTS and proprietary. If your organization's or firm's system is a combination of elements that are COTS and proprietary, note which items are COTS and those that are proprietary. Alternatively, for any organization or firm that is unable to provide references associated with the actual implementation and use of a Clerk-Recorder software and hardware system, indicate any pilot programs, testing, etc. that sufficiently support a proposed system being successfully implemented and operated.

Proposal Evaluation

The intention of the County of Inyo is to cost-effectively acquire a new Clerk-Recorder software and hardware system. Responses to this RFP will be evaluated according to the following criteria:

- Quality, clarity and responsiveness of the proposal in conformance with the instructions, conditions and format as requested in this document;
- Functionality, adaptability and technical requirements of the proposed solution;
- Cost

A team selected by the County of Inyo will evaluate all proposals deemed responsive to the request. The initial evaluation will consider the submitted responses only. The proposals will be ranked based on an analysis conducted by the evaluation team.

Discussions may take place with the finalists to clarify the proposal and obtain a best and final offer. Any award granted will be granted to the respondent proposing the best solution for the County as determined solely by the County.

Exceptions and Omissions

Should any omissions, discrepancies or ambiguities be discovered in this RFP, the County should be notified in writing (via email) immediately. All questions will be answered to the extent possible in an addendum released as soon as possible after the County receives the notification. Please note that all omissions, discrepancies, or ambiguities are not purposeful. Please direct all such notifications to:

Kammi Foote kfoote@inyocounty.us

Additional Information

If additional information is required to complete the proposal, the respondent is cautioned that the opportunity to obtain additional information is limited to technical and/or procedural questions and should not be viewed as a sales presentation opportunity. Requests must be made in writing via email. Please direct all such requests to:

Kammi Foote kfoote@inyocounty.us

Project Contact

Kammi Foote, Clerk-Recorder
County of Inyo
P.O. Drawer F
Independence, CA. 93526

Phone: 760-878-0224
Fax: 760-878-1805
Email: kfoote@inyocounty.us

Submissions

A hard copy of the proposal must be submitted.

Via U.S. Mail* to:

Inyo County Board Clerk
RFP- Clerk-Recorder Software & Hardware System
P.O. Box Drawer N
Independence, CA 93526

By means other than U.S. Mail:

Inyo County Board Clerk
RFP-Clerk-Recorder Software Hardware System
224 North Edwards Street
Independence, CA 93526

*(The U.S. Post Office DOES NOT deliver to street addresses in Independence, CA)

Submissions must be received no later than **3:30 PM, Thursday, March 11, 2021**. The County reserves the right to deem Respondent non-responsive if submissions are not received by the date and time stipulated.

Timeline

Proposals will be processed according to the following schedule of estimated target dates:

Issue RFP to potential bidders	02/16/21
Proposals Due	03/11/21
Selection of Finalists	04/01/21 (target, actual selection may differ)
Implementation Completed	06/30/21 (or sooner)

Proposal's Use / Respondent Guarantees

The respondent's response to this RFP acknowledges that the rights have been reserved to include any part or parts of the selected respondent's proposal in the final contract. Submission of any proposal indicates acceptance of the conditions contained in the RFP.

By submission of a proposal, the respondent certifies that:

The prices in this proposal have been arrived at independently and without consultation, communication, or agreement, for the purpose of restricting competition as to any matter relating to such prices, with any vendor.

The respondent has not paid or agreed to pay any fee or commission, or any other item of value contingent on the award of this contract to any employee, official, or current contracting consultant of the County of Inyo.

All proposals submitted and the included pricing shall be valid for a period of 60 calendar days from the date of proposal opening.

Rights of County

The County, at its sole discretion, reserves the right to:

1. Reject any or all responses without cause.
2. Reject all responses and seek new responses when such action is judged to be in the best interest of the County.
3. Request and receive additional information as the County believes is necessary and to disqualify any company and reject any responses for failure to promptly provide such additional information.
4. To waive any informalities or incomplete responses and to disregard all non-conforming, non-responsive or conditional proposals.
5. Negotiate with any and all respondents.

Section 4: SUBMITTAL REQUIREMENTS

4.1 Proposal Format

To facilitate the analysis of responses to this RFP, respondents are required to prepare their proposals in accordance with the instructions outlined in this section. Respondents whose proposals deviate from these instructions may be considered non-responsive and be disqualified at the discretion of the County.

Respondents shall prepare proposals as simply as possible and provide a straightforward, concise description of its capabilities to satisfy the requirements of the RFP. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures, and tables shall be numbered and clearly labeled. The proposal must be organized into the following sections:

<u>Section</u>	<u>Heading</u>
	Title Page
1.0	Proposed Design
2.0	Proposed Technology
3.0	Implementation Schedule
4.0	Cost Proposal

Requirements relative to each section of the RFP response are described below.

Proposal Section 1: Proposed Design

The County is interested in a new Clerk-Recorder System, including software, hardware and related system services to replace the Clerk-Recorder System currently used by Inyo County. In Section 1, propose a design that will accommodate this goal.

Proposal Section 2: Proposed Technology

Based on its geographically remote location and organizational culture, the County is most interested in solutions that are robust, reliable and sustainable. For each component proposed, indicate its specifications and its purpose in fulfilling the stated project goals.

Proposal Section 3: Implementation Schedule

Provide a project schedule detailing project milestones, resources and timings.

Proposal Section 4: Cost Proposal

Prepare a cost proposal that details, quantifies and totals all costs associated with successful completion of the project. The items described in the cost proposal should reconcile to the items and efforts described in Sections 1, 2 and 3 of the proposal.

The County realizes costs are based on some assumptions and pledges to work with all respondents during the negotiation process to arrive at a fair and equitable agreement. Respondents are encouraged to provide documentation about any assumption made while determining pricing.

Proposal Section 5: Exceptions to Contract

The successful Proposer will be expected to execute County of Inyo Contract No. 116 (a copy of which is attached hereto as Exhibit A). The Respondent's proposal will be part of the Contract. To be considered during negotiations, any exceptions a Proposer takes with the County of Inyo Contract No. 116 must be identified as part of the Proposal.