

**COUNTY OF YUBA  
REQUEST FOR PROPOSAL**

***Clerk-Recorder System***



**PROPOSAL CLOSING DATE:**

***Friday, May 10, 2013  
At 2:00pm PDT***

**COUNTY OF YUBA  
REQUEST FOR PROPOSAL  
SPECIFICATIONS, TERMS & CONDITIONS  
for  
Clerk Recorder System**

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**I. STATEMENT OF WORK**

**A. INTENT**

It is the intent of these specifications, terms and conditions to describe a comprehensive integrated Clerk-Recorder's document capture, reporting, storage maintenance and cashiering system including conversion migration services/management as required by the Yuba County Clerk-Recorder's Office.

The successful bidder will design, install and implement the system while also providing comprehensive system operation and maintenance documentation.

The County intends to award a contract to the bidder selected as the most responsible bidder whose response conforms to the RFP and meets the County's requirements. The duration of the contract and the terms/type of licensing will be negotiated during the contract phase of the award.

**B. BACKGROUND**

The Yuba County Clerk-Recorder's Office maintains and preserves all official records and indices such as vital records, general business records, and land records/maps.

The current operating environment of the Yuba County Clerk-Recorder's Office serves the public by:

- Recording documents related to property transactions, creating and maintaining an index, and archiving the documents.
- Maintaining the vital records index and issuing certified copies of birth, death, and marriage records.
- Issuing marriage licenses and conducting civil marriage ceremonies.
- Filing fictitious business name (FBN) statements, professional registrations, notary bonds, environmental documents, and other miscellaneous documents/filings.
- Collecting and distributing fees and taxes for all transactions.

Yuba County's population is estimated at approximately Seventy-Two Thousand, One Hundred Fifty-Five (72,155).

The following is a list of estimated annual transactions by type:

<u>Transaction Types</u>	<u>Annual Estimates</u>
Recordings	19,000
Certified birth, death or marriage certificates	1,837
Marriage licenses	356
Fictitious Business Name statements	322
Notary Oaths	38
<b>Total</b>	<b>21,553</b>

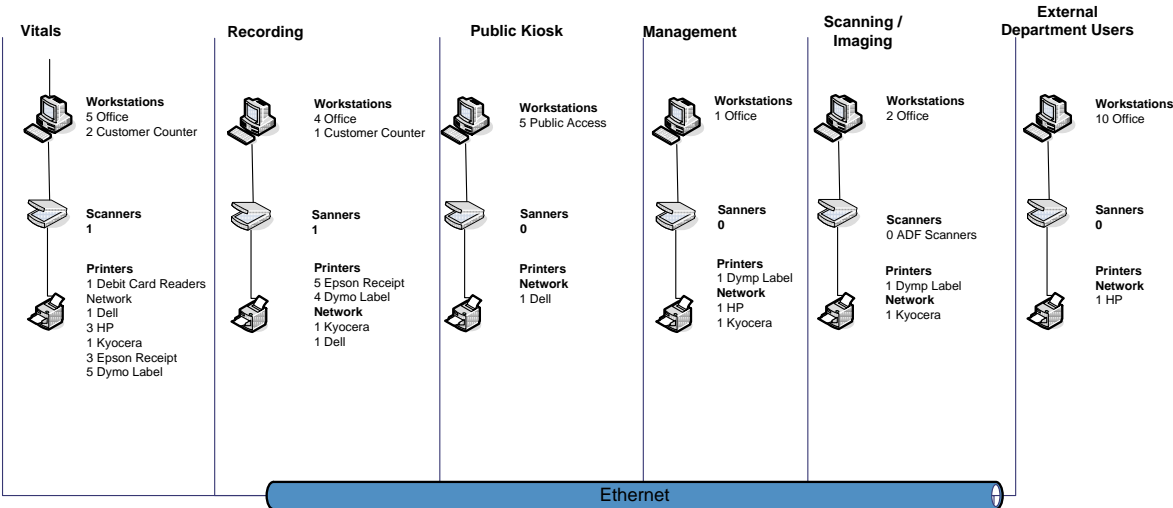
The current system is operating in a virtual environment on blade servers running Windows Server 2008 R2 and utilizing Hyper-V hypervisor technology. The current database management system is on Microsoft SQL Server 2008 R2, however the county can support SQL 2005 and SQL 2012. The current images are stored in TIFF Group IV format. The system is accessed via Local Area Network, Wide Area Network, Public Web access as well as over VPN.

The Clerk-Recorder’s Office is functionally divided as follows:

1. Vitals / FBN/Professional Registrations/CEQA Filings
2. Recording / Document Reception

Each area’s current technical set-up is as follows:

### Clerk Recorder Client Hardware Diagram By Work Area



C. SCOPE

The County seeks a system capable of handling all County Clerk and Recorder functions in a fully-integrated manner without any external system or co-location. Any contract awarded as a result of this RFP will be for the design, provision, installation and implementation of a comprehensive integrated Clerk-Recorder's document capture, storage management and cashiering system including conversion migration services/management and ongoing maintenance and support.

The successful bidder will provide, install, program, test and fully implement, to the County's satisfaction, a Clerk-Recorder System for the County. The bidder will train County staff in the use and maintenance of the system.

The project scope also includes conversion and migration services, upgrades and ongoing maintenance, as needed.

D. VENDOR MINIMUM QUALIFICATIONS

1. Vendor minimum qualifications include, but are not limited to, the following:
  - a. A minimum of five (5) years verifiable experience in providing large scale electronic document management solutions to County Clerk and Recorder agencies in the State of California of a similar size to that of the County of Yuba within the last seven (7) years.
  - b. Verifiable evidence of a successful installation of the proposed CR System in comparable circumstances within the past two (2) years.
  - c. All permits, licenses and professional credentials necessary to supply products and perform services as specified under this RFP.

The County may accept alternate experience if it conforms to the spirit of the requirements. Vendors are encouraged to participate if they can demonstrate similar qualifications.

E. SPECIFIC REQUIREMENTS

The major components of this project are:

1. Clerk-Recorder System (CR System) is defined as the installation and implementation of a comprehensive, integrated Clerk-Recorder document capture, reporting, storage management & cashiering system.

2. Data Conversion/Migration Services is defined as the conversion services/management of data stored CDs, external drive, paper, books and index cards as well as migration and integration of the current online data into the proposed solution; and analysis of index-to-image availability.
3. System must maintain compliance with State law and regulations on Clerk Recorder functions (Government Code section 12168.7, Reference: sections 25105, 26205, 26205.1, 26205.5, 26907, 27001, 27322.2, 34090.5, and 60203, Government Code; section 102235, Health and Safety Code; and section 10851, Welfare and Institutions Code) including the Secretary of State California Code of Regulations Title: 2 Administration, Division 7: Secretary of State, Chapter 15: Trustworthy Electronic Document and Record Preservation.  
<http://www.sos.ca.gov/admin/regulations/tech/trustworthy-electronic-doc-or-record-preservation.htm#22620.7>
4. System must be regularly updated to adhere to all mandated state regulations and requirements.

The specific requirements for each component are as follows:

1. CR System

A fully-automated comprehensive system for all Clerk and Recorder functions. The system must provide:

- a. Transactions Processing

The flexibility to accept standard forms of payment for in-person and electronic transactions. It must have the ability to track key information about transactions whether payment is successful or not. The ability to set business rules surrounding actions for successful and unsuccessful transactions is essential. The system must retain payment and receipt history, reconcile accounts, and report overages and/or shortages. Transactions must be auditable. Transaction reporting must be configurable.

- b. Reconciliation

Automatic reconciliation for all transactions, activities, revenue, accounts, and deposits. It is essential that banknote paper distribution reconciles with associated revenue. The CR System must provide the ability to reconcile revenue according to flexible timeframes, transactions and/or activity. Reporting periods must be configurable. Reconciliation must be configurable and auditable. Accurate day end and month end account

reporting transactions of cash, check, charges, journal, and electronic payment customers. The system must provide the ability to make accounting entries for funds deposited directly with the Treasurer/Auditor.

c. Cashiering/ Cash Out

A cashiering function able to perform all business calculations automatically and accurately in compliance with business, state, and local rules and requirements. Calculations input must be configurable. The process of beginning and ending a Cashiering session should be integrated into the system with strong internal controls to formalize and capture the process of cashing in and out as well as reporting cashiering activities, auditing activities, and applying strong accounting controls. The cashiering process must result in a printed receipt to be provided to the customer. The cashiering function must provide the ability to correct transaction errors to include retendering or deleting transactions while maintaining an auditable trail of the action.

d. Vital Records Banknote Paper Stock Management

Security controls and settings to help manage, disburse, track, reconcile, and report on vital banknote paper and all associated transactions. System must be able to account for spoiled, voided, and no charge bank note usage.

e. Billing and Invoicing

A flexible and automatic means of billing/invoicing customers for goods and services. Account status reports should be flexible and have real-time updates of account status. Automatic invoicing should be available for account-based customers. Reporting must be available in hard copy and soft copy, using security to provide access to online reports. The County must be able to save online soft copies. All billing/invoicing activity must be auditable.

f. Vital Records

The ability to output document copies to banknote, souvenir, or plain paper according to business rules for the document type. The output paper type and certificate/license field names must be configurable. The County would like to have the ability to provide an in-office kiosk and online submission for marriage applications. The kiosk and online marriage application submission must integrate with standard office clerk-assisted marriage applications for seamless queuing and processing of all submitted applications. Ideally, the CR System must also provide the ability to



barcode, label, and code document type (ie. birth, death, or marriage), characteristics (ie. sealed, confidential, etc.), and to initiate index creation for vital records. All vital records activity must be auditable.

- (1) Professional Registration Processing – The ability to accept, index, and store professional registration filings; assign unique sequential registration numbers to each filing type; track status of associated live scan filings. Professional registrations types: Legal Document Assistant, Professional Photocopier, Process Server, Unlawful Detainer Assistant, Notary Public.
- (2) Fictitious Business Name (FBN) Statement Filing – The ability to accept, index, and store FBN filings, assign file registration numbers based on county format and track abandonments, withdrawal of partner and publication affidavits.
- (3) Marriage License Issuance & Registration – The ability to issue marriage licenses that conform to state regulations as to form and content as well as implement any future changes mandated by the State of California. Registration of marriage licenses shall include the assignment of registration numbers that conform to state format requirements. The ability to identify licenses not registered as of any point in time. The ability to generate appropriate documentation and forms for issuing duplicate marriage licenses. System must support various printers for the production of marriage licenses without requiring manual intervention on the part of the user.

g. General Business

The ability to capture, store, manage and process general business documents. Stored documents must be secured and easily retrievable. All general business activity must be auditable.

h. Indexing/Verification

The ability to index documents. It must use an integrated automated learning tool to assist in applying typical abbreviations and common indexing rules and shortcuts. Hot keys should be included and configurable to help maximize productivity. Indexing and verification queues must be customizable. All indexing/verification activity must be auditable. Ability to key or sight verify. Ease in making corrections.

i. Recording

The ability to serve account-based and walk-up customers meeting all California and County requirements with a high level of service, efficiency, and innovation. It must leverage technology in service delivery and system integration including, but not limited to, electronic recording. All recording activity must be auditable.

(1) Electronic Recording – The ability to record, index, and verify electronically submitted documents in compliance with GC 27390 - 27399. NOTE: The County does not currently have this functionality.

j. Truncation

The ability to truncate documents in compliance with GC 27300 – 27307.

k. Scanning/Document Capture

The ability to scan multiple documents with application features to automatically handle common document quality control tasks and to minimize manual intervention to preserve the highest quality document. The system must provide hot key controls for flexibility in handling quality control exceptions. Scanner performance should be at the manufacturer-rated speed. All scan/capture activity must be auditable. The ability to use current scanner software (virtual rescan VRSS) to improve the legibility and image reproduction of scanned documents and vitals. Safeguard against deleting an image in error. The ability to scan at least 300dpi (current scan setting) for best image quality and to report or identify images that failed to scan or be captured. Vitals scanned images must be formatted to print within the borders of banknote without manual intervention required.

l. Import/Export

The ability to export and/or FTP data from the CR System for business purposes managed by user id-based security. The export to physical media must be flexible to accommodate writing to typical mediums. All import/export activities must be auditable. The system must be able to export both truncated and un-truncated images.

m. User Productivity/Workflow Reporting

Dashboards and intuitive monitoring tools to aid in workflow and user productivity review. Tools must provide real-time information while allowing review of historical data.

n. Correspondence

Configurable reason-code customer correspondence templates for go-back/document rejection and customer service letters. Letters should be exportable to and compatible with Microsoft Word. Generated correspondence must be saved without overwriting the templates and searchable. Ideally, correspondence should be linked to the documents/transactions to which it pertains. All correspondence activity must be auditable. The ability to use workflow for supervisor approval is desirable.

o. Official Public Records Search/Customer Service

Secure public kiosks for public self-service access to system searches of public records. The ability to have public kiosks print to County-staffed customer service area is required. Authorized Clerk-Recorder staff must be able to manage print queues to network printers. The system must provide a means of claiming and confirming document printouts and an intuitive access for customer service use in assisting customers by telephone.

p. System Interface

An electronic interface with various systems. Exhibit F details those system interfaces.

q. Technology

A modern technical environment that is current, innovative, efficient, robust, resilient, and flexible for all aspects of technology.

r. Electronic system documentation and help for all functions.

s. Customer Service/System Maintenance

- (1) Bidder must indicate the hours that customer service support is available. In addition, bidder should indicate the response time for such calls. County hours of operation are Monday through Friday 8:00am – 5:00pm PST. County requires that staff have access to customer service within these hours.
- (2) System Maintenance should be performed before or after the County operating hours indicated above.

- (3) Bidders Standard Service Level Agreements (SLAs) should be provided with your proposal.

t. Reporting

The proposed CR System must have strong, dynamic, and configurable fiscal reporting and include access to a large selection of useful standard fiscal reports. The system must include the following:

- (1) The ability to query data to create custom ad-hoc analytical reports on fiscal data; and
- (2) Easily retrievable data elements (including system time stamps, transactions by user, task durations by user, etc.) that are accessible at any time by authorized persons without database or programming knowledge and experience.

u. Training (on-site system and on-going refresher)

Approximately forty (40) on-site training seats to cover full system functionality and additional classes for specialized areas. Minimum training content specifications and trainee counts for initial training are specified below.

- (1) Up to 20 trainees - System training, all modules
- (2) 3 trainees - Supervisor/Manager - Productivity and Workflow
- (3) 2 trainees - System Administration/Technology
- (4) 3 trainees - Accounting/Reporting
- (5) 5 trainees - Public Search
- (6) 5 trainees - Scanning

Bidders must specify the number of hours/days that will be dedicated to each of the areas and the course contents. If topics are covered in different course combinations, specify and describe the target audience. Bidders must also specify their plan for on-going and refresher training after system implementation. On-going and refresher training may be web-based, computer-based, or on-site. Bidders must provide all training materials as

well as specify and coordinate set-up of equipment required for on-site training with the Clerk-Recorder.

2. Data Conversion/Migration -

The conversion requirements include, but are not limited to, the following:

- a. Provide migration services for all current system data.
- b. Indexing and providing conversion services for data from different media (i.e., CD, DVD, paper, books, land records, and any other offline medium) for the purpose of integration into the online system;
- c. Determine how redaction is managed in the current system through overlays and convert these files to a true original and copy redaction process.
- d. Analyze index-to-image availability;
- e. Report and provide a plan of action to handle discrepancies, where applicable; and
- f. Work with current vendor regarding migration of all data from current system to new system.

F. DELIVERABLES / REPORTS

Within three weeks of contract signing, the successful bidder will provide a CR System project life cycle plan that is acceptable to the County. The plan will include sufficient detail to ensure the successful delivery of the functionalities and features described in this RFP and further clarified in the demonstration and Discovery process. The plan must clearly confirm the proposed resources that will be allocated to this project; what types of resources are needed from the County; and the roles of each entity in all areas.

The plan for the installation and implementation of the CR System and migration of current online data must be built on the assumption that the project will be completed within three (3) months

At a minimum, the plan shall address the following elements and contain a schedule for the delivery of the following services and reports at specified intervals:

<b><u>DESCRIPTION</u></b>	<b><u>FREQUENCY</u></b>
<b>Project Implementation Reporting</b>	
<ol style="list-style-type: none"> <li>1. Participation in project meetings.</li> <li>2. Weekly reports documenting meeting agenda, action items, resolution, and weekly goals.</li> </ol>	Weekly
<ol style="list-style-type: none"> <li>3. An initial change control process description.</li> <li>4. A detailed description of the issue management process for problems encountered during project implementation.</li> <li>5. Initial analysis report – a hands-on actual look at the scope of work for verification of the current state and creation of a plan to meet requirements.</li> </ol>	One-Time
<ol style="list-style-type: none"> <li>6. Maintenance of an up-to-date resource list.</li> </ol>	Continuous
<b>Conversion- Migration Reporting</b>	
<ol style="list-style-type: none"> <li>1. An initial conversion analysis report assessing the body of work and detailing a conversion/migration plan and project schedule.</li> <li>2. An initial migration analysis and post migration report.</li> </ol>	One-Time
<ol style="list-style-type: none"> <li>3. Weekly updates on conversion schedule, status of outgoing conversion media and incoming converted data.</li> <li>4. Maintenance of a current list of conversion contacts.</li> <li>5. Data reconciliation, error, and statistical reports on conversion batches or grouped work.</li> <li>6. A means of reporting acceptance or rejection of submitted conversion data in batches.</li> <li>7. Maintenance of weekly or less frequent reports, by agreement, on problem corrective status and action</li> <li>8. Report on conversion data reconciliation activity on a monthly frequency.</li> <li>9. Report any data reconciliation exceptions and the reason(s) for the exception (Data reconciliation is defined as the action of assuring that all data is migrated, converted, indexed, imported and integrated.)</li> <li>10. A final conversion report upon acceptance of the last batch.</li> </ol>	Weekly/Monthly
<b>Reconciliation</b>	
<ol style="list-style-type: none"> <li>1. Reconciliation of index to image</li> <li>2. Report and correct index to image mismatch problems</li> </ol>	Continuous
<b>System</b>	

<ol style="list-style-type: none"> <li>1. An analysis report of the current environment and plan for meeting requirements.</li> <li>2. A test and training environment plan.</li> <li>3. Set-up a test and training environment at the CRO.</li> <li>4. A current and proposed system interface analysis report for all interfaces.</li> <li>5. A database schema prior as part of a transition of database administration to the County before closing the project as complete.</li> <li>6. A parallel testing plan.</li> <li>7. Performance of and report on a parallel testing result.</li> <li>8. Implement the new system and an implementation report.</li> </ol>	<p>One-Time</p>
<b>Support</b>	
<ol style="list-style-type: none"> <li>1. A database administration and technical support knowledge transfer plan. This is a document describing the approach to and timing of formal training. CRO technical resources, and work experiences that will prepare CRO technical resources to monitor, operate and support the system effectively at the end of the project.</li> </ol>	<p>One-Time</p>
<b>Access</b>	
<p>An initial report describing the following:</p> <ol style="list-style-type: none"> <li>1. Any network access needs</li> <li>2. The resources needing access</li> <li>3. Access frequency and purpose</li> </ol>	<p>One-Time</p>
<b>Training</b>	
<ol style="list-style-type: none"> <li>1. A training plan and schedule.</li> <li>2. Tracking for initial on-site user training.</li> <li>3. A report following training documenting the names of the delivered training modules, the names of the attendees, and any recommended training follow-up action items.</li> </ol>	<p>Initial w/updates after each training session.</p>

G. PAYMENT MILESTONES

The County intends to remit payments for the individual project headings according to the following milestones. The specific percentages and/or amounts of each payment will be determined during contract negotiations.

- Payment 1 – 50% of licensing at contract signing.
- Payment 2 – 20% of implementation at acceptance of project plan.
- Payment 3 – 30% of implementation at beginning of UAT.

- Final Payment – 50% of implementation and 50% of licensing at final acceptance.

#### H. DEBARMENT / SUSPENSION POLICY

In order to prohibit the procurement of any goods or services ultimately funded by Federal awards from debarred, suspended or otherwise excluded parties, each bidder will be screened at the time of RFP response to ensure bidder, its principal and their named subcontractors are not debarred, suspended or otherwise excluded by the United States Government in compliance with the requirements of 7 Code of Federal Regulations (CFR) 3016.35, 28 CFR 66.35, 29 CFR 97.35, 34 CFR 80.35, 45 CFR 92.35 and Executive Order 12549.

- The County will verify bidder, its principal and their named subcontractors are not on the Federal debarred, suspended or otherwise excluded list of vendors located at [www.epls.gov](http://www.epls.gov); and

## II. INSTRUCTIONS TO BIDDERS

### I. COUNTY CONTACTS

Administrative Services-Purchasing is managing the competitive process for this project on behalf of the County. All contact during the competitive process is to be through the Administrative Services-Purchasing Department only.

The evaluation phase of the competitive process shall begin upon receipt of sealed bids until a contract has been awarded. Bidders shall not contact or lobby evaluators during the evaluation process. Attempts by Bidder to contact evaluators may result in disqualification of bidder.

All questions regarding these specifications, terms and conditions are to be submitted in writing, preferably via e-mail to:

Adrian Metcalf, Administrative Technician  
County of Yuba  
Administrative Services, Purchasing Division  
915 8th Street, Suite 119  
Marysville, CA 95901

E-Mail: [ametcalf@co.yuba.ca.us](mailto:ametcalf@co.yuba.ca.us)  
FAX: (530) 749-7884



The County’s website will be the official notification posting place of all Requests for Interest, Proposals, Quotes and Addenda. Go to <http://www.co.yuba.ca.us/departments/admin%20services/purchasing%20solicitaions.aspx>

J. CALENDAR OF EVENTS

Event	Date/Location
Request Issued	<b>Wednesday, April 10, 2013</b>
Written Questions Due	<b>by 5:00 p.m. on Wednesday, April 24, 2013 PDT</b>
Networking/Bidders Conference #1	<b>Thursday, April 25, 2013 @ 2:00 p.m. PDT.</b> <b>at: Administrative Services 915 8th Street Marysville Conference Room Marysville, CA 95901</b>
Final Addenda Issued	<b>Monday, April 29, 2013</b>
Responses Due	<b>Friday, May 10, 2013 by 2:00 p.m. PDT</b>
Evaluation Period	<b>May 13 – May 17, 2013</b>
Vendor Interviews	<b>June 10, 2013 – June 14, 2013</b>
Board Award Date	<b>Late June 2013</b>
Contract Start Date	<b>July 2013</b>
Implementation Completed	<b>September/October 2013</b>

**Note:** Award and start dates are approximate.

It is the responsibility of each bidder to be familiar with all of the specifications, terms and conditions and the site condition. By the submission of a bid, the bidder certifies that if awarded a contract they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.

K. NETWORKING / BIDDERS CONFERENCES

Networking/bidders conferences will be held to:

- Provide an opportunity for bidders to ask specific questions about the project and request RFP clarification.
- Provide the County with an opportunity to receive feedback regarding the project and RFP.

Written questions submitted prior to the networking/bidders conferences, in accordance with the Calendar of Events, and verbal questions received at the networking/bidders conferences, will be addressed whenever possible at the networking/bidders conferences. All questions will be addressed and the list of attendees will be included in an RFP Addendum following the networking/bidders conferences in accordance with the Calendar of Events.

Potential bidders are strongly encouraged, but not required, to attend a networking/bidders conference in order to further facilitate subcontracting relationships.

Failure to participate in a networking/bidders conference will in no way relieve the Contractor from furnishing goods and/or services required in accordance with these specifications, terms and conditions. Attendance at a networking/bidders conference is strongly encouraged and recommended but is not mandatory.

Networking/bidders conferences will be held on:

Date: Thursday, April 25, 2013 at 2:00pm PDT

Location: County of Yuba  
Government Center  
Marysville Conference Room  
915 8<sup>th</sup> Street  
Marysville, CA 95901

L. SUBMITTAL OF BIDS

1. All bids must be SEALED and must be received at the County of Yuba Administrative Services Department indicated in Section I **BY** 2:00 p.m. PDT on the due date specified in the Calendar of Events.

NOTE: LATE AND/OR UNSEALED BIDS CANNOT BE ACCEPTED. IF HAND DELIVERING BIDS PLEASE ALLOW TIME FOR METERED STREET PARKING OR PARKING IN AREA PUBLIC PARKING LOTS AND ENTRY INTO SECURE BUILDING.

Bids will be received only at the address shown **below**, and by the time indicated **in the Calendar of Events**. Any bid received after said time and/or date or at a place other than the stated address cannot be considered and will be returned to the bidder unopened.

All bids, whether delivered by an employee of Bidder, U.S. Postal Service, courier or package delivery service, must be received and time stamped at the stated address prior to the time designated. The Administrative Services Purchasing

Division's timestamp shall be considered the official timepiece for the purpose of establishing the actual receipt of bids.

2. Bids are to be addressed **and delivered** as follows:

Clerk Recorder System  
County of Yuba  
Administrative Services, Purchasing Division  
915 8th Street, Suite 119  
Marysville, CA 95901

3. Bidders are to submit one (1) original hard copy bid, with original ink signatures, plus two (2) copies of their proposal. Original proposal is to be clearly marked, printed on plain white paper, and must be either loose leaf or in a 3-ring binder (**NOT** bound). It is preferred that all proposals submitted shall be printed double-sided and on minimum 30% post-consumer recycled content paper. Inability to comply with this recommendation will have no impact on the evaluation and scoring of the proposal.

Bidders must also submit two (2) electronic copies of their proposal. The electronic copy must be a single file, scanned image of the original hard copy with all appropriate signatures, and must be on disk or USB flash drive and enclosed with the sealed hardcopy of the bid.

4. Bidder's name and return address must also appear on the mailing package.
5. No telegraphic, email (electronic) or facsimile bids will be considered.
6. Bidder agrees and acknowledges all RFP specifications, terms and conditions and indicates ability to perform by submission of its bid.
7. Background Investigations. A successful background clearance (livescan) is required for all individuals that will require log-in to the County's network.
8. Submitted bids shall be valid for a minimum period of 240 days.
9. All costs required for the preparation and submission of a bid shall be borne by Bidder.
10. Only one (1) bid response will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives may be included in one (1) response. For purposes of this requirement, "partnership" shall mean, and is limited to, a legal partnership formed under one (1) or more of the provisions of the California or other state's Corporations Code or an equivalent statute.

11. Proprietary or Confidential Information: No part of any bid response is to be marked as confidential or proprietary. County may refuse to consider any bid response or part thereof so marked. Bid responses submitted in response to this RFP may be subject to public disclosure. County shall not be liable in any way for disclosure of any such records. Additionally, all bid responses shall become the property of County. County reserves the right to make use of any information or ideas contained in submitted bid responses. This provision is not intended to require the disclosure of records that are exempt from disclosure under the California Public Records Act (Government Code Section 6250, *et seq.*) or of “trade secrets” protected by the Uniform Trade Secrets Act (Civil Code Section 3426, *et seq.*).
12. All other information regarding the bid responses will be held as confidential until such time as the County Selection Committee has completed their evaluation, an intended award has been made by the County Selection Committee, and the contract has been fully negotiated with the intended awardee named in the intent to award/non-award notification(s). The submitted proposals shall be made available upon request no later than five (5) business days before approval of the award and contract is scheduled to be heard by the Board of Supervisors. All parties submitting proposals, either qualified or unqualified, will receive mailed intent to award/non-award notification(s), which will include the name of the bidder to be recommended for award of this project. In addition, award information will be posted on the County’s “Contracting Opportunities” website, mentioned above.
13. Each bid received, with the name of the bidder, shall be entered on a record, and each record with the successful bid indicated thereon shall, after the award of the order or contract, be open to public inspection.

M. RESPONSE FORMAT

1. Bid responses are to be straightforward, clear, concise and specific to the information requested.
2. In order for bids to be considered complete, Bidder must provide all information requested. See Exhibit E, Response Content and Submittals Completeness Checklist.

N. EVALUATION CRITERIA/SELECTION COMMITTEE

All proposals will be evaluated by a County Selection Committee (CSC). The CSC may be composed of County staff and other parties that may have expertise in the system needs of the Yuba County Clerk-Recorder’s Office and experience in working with Clerk

Recorder systems. The CSC will select a contractor in accordance with the evaluation criteria set forth in this RFP. The evaluation of the proposals shall be within the sole judgment and discretion of the CSC.

All contact during the evaluation phase shall be through the Administrative Services-Purchasing Division only. Bidders shall neither contact nor lobby evaluators during the evaluation process. Attempts by Bidder to contact and/or influence members of the CSC may result in disqualification of Bidder.

The CSC will evaluate each proposal meeting the qualification requirements set forth in this RFP. Bidders should bear in mind that any proposal that is unrealistic in terms of the technical or schedule commitments, or unrealistically high or low in cost, will be deemed reflective of an inherent lack of technical competence or indicative of a failure to comprehend the complexity and risk of the County's requirements as set forth in this RFP.

Bidders are advised that in the evaluation of cost it will be assumed that the unit price quoted is correct in the case of a discrepancy between the unit price and an extension.

As a result of this RFP, the County intends to award a contract to the responsible bidder whose response conforms to the RFP and whose bid presents the greatest value to the County, all evaluation criteria considered. The combined weight of the evaluation criteria is greater in importance than cost in determining the greatest value to the County. The goal is to award a contract to the bidder that proposes the County the best quality as determined by the combined weight of the evaluation criteria. The County may award a contract of higher qualitative competence over the lowest priced response.

The basic information that each section should contain is specified below, these specifications should be considered as minimum requirements. Much of the material needed to present a comprehensive proposal can be placed into one of the sections listed. However, other criteria may be added to further support the evaluation process whenever such additional criteria are deemed appropriate in considering the nature of the goods and/or services being solicited.

Each of the following Evaluation Criteria below will be used in ranking and determining the quality of bidders' proposals. Proposals will be evaluated according to each Evaluation Criteria, and scored on a five-point scale.

The evaluation process may include a two-stage approach including an initial evaluation of the written proposal and preliminary scoring to develop a short list of bidders that will continue to the final stage of oral presentation, demonstrations and reference checks. The preliminary scoring will be based on the total points, excluding points allocated to references, oral presentation and demonstration.

If the two-stage approach is used, the four (4) bidders receiving the highest preliminary scores will be invited to an oral presentation and demonstration. Only the bidders meeting the short list criteria will proceed to the next stage. All other bidders will be deemed eliminated from the process. All bidders will be notified of the short list participants; however, the preliminary scores at that time will not be communicated to bidders.

The zero to five-point scale range is defined as follows:

0	Not Acceptable	Non-responsive, fails to meet RFP specification. The approach has no probability of success. If a mandatory requirement this score will result in disqualification of proposal.
1	Poor	Below average, falls short of expectations, is substandard to that which is the average or expected norm, has a low probability of success in achieving objectives per RFP.
2	Fair	Has a reasonable probability of success, however, some objectives may not be met.
3	Average	Acceptable, achieves all objectives in a reasonable fashion per RFP specification. This will be the baseline score for each item with adjustments based on interpretation of proposal by Evaluation Committee members.
4	Above Average / Good	Very good probability of success, better than that which is average or expected as the norm. Achieves all objectives per RFP requirements and expectations.
5	Excellent / Exceptional	Exceeds expectations, very innovative, clearly superior to that which is average or expected as the norm. Excellent probability of success and in achieving all objectives and meeting RFP specification.

The Evaluation Criteria will be based on the following areas:

Evaluation Criteria	
A.	<p>Completeness of Response: Responses to this RFP must be complete. Responses that do not include the proposal content requirements identified within this RFP and subsequent Addenda and do not address each of the items listed below will be considered incomplete, be rated a Fail in the Evaluation Criteria and will receive no further consideration.</p> <p>Responses that are rated a Fail and are not considered may be picked up at the delivery location within 14 calendar days of contract award and/or the completion of the competitive process.</p>

B.	<p>Debarment and Suspension: Bidders, its principal and named subcontractors are not identified on the list of Federally debarred, suspended or other excluded parties located at <a href="http://www.epls.gov">www.epls.gov</a>.</p>
D.	<p>Proposed Clerk-Recorder System:</p> <p>An evaluation will be made of Bidder's response along with all required aspects of their proposed CR System as a whole. Points will be distributed at the County's sole discretion on the basis of whether or not Bidder's response meets the County's needs as described in this RFP.</p>
E.	<p>Data Conversion/Migration Plan and Timeline:</p> <p>The County expects the data conversion and migration to be completed to adhere to the calendar of events.</p> <p>An evaluation will be made of the Bidder's proposed data conversion/migration plan and timeline. Additional credit will be given for the identification and planning for mitigation of schedule risks which Bidder believes may adversely affect the County's expected completion time of fifteen months from the contract start date.</p>
F.	<p>Relevant Experience:</p> <p>Proposals will be evaluated against the RFP specifications and the questions below:</p> <ul style="list-style-type: none"><li>- Do the individuals assigned to the project have experience on projects of size and scope?</li><li>- Does the bidder have experience providing ongoing support, maintenance and training?</li><li>- Are resumes complete and do they demonstrate backgrounds that would be desirable for individuals engaged in the work the project requires?</li><li>- How extensive is the applicable education and experience of the personnel designated to work on the project?</li></ul>
G.	<p>Oral Presentation and Demonstration:</p> <p>Demonstrations will be scripted and Contractor must show the Evaluation Committee the functionalities of the system and provide</p>

	information if these functionalities are a standard feature, configuration option, or require an enhancement fee. The proposals may then be re-evaluated and re-scored based on the oral presentation and demonstrations.
H.	Cost:  Proposals will be evaluated on cost in relation to the County's budget for this project.

O. NOTICE OF AWARD

1. At the conclusion of the RFP response evaluation process (“Evaluation Process”), all bidders will be notified in writing by e-mail or fax, and certified mail, of the contract award recommendation, if any, by County of Yuba Administrative Services. The document providing this notification is the Notice of Intent to Award.

The Notice of Intent to Award will provide the following information:

- The name of the bidder being recommended for contract award; and
  - The names of all other parties that submitted proposals.
2. The submitted proposals shall be made available upon request no later than five (5) business days before approval of the award and contract is scheduled to be heard by the Board of Supervisors.

P. BID PROTEST / APPEALS PROCESS

Any actual or prospective bidder, offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the Director of Administrative Services. The protest shall be submitted in writing to the Director of Administrative Services within five (5) working days after such aggrieved person or company knows or should have known of the facts giving rise thereto.

The Director of Administrative Services, or in his or her absence the Assistant Director of Administrative Services, shall issue a written decision within ten (10) working days after receipt of the protest. The decision shall:

- (a) State the reason for the action taken.



(b) Inform the protestant that a request for further administrative appeal of an adverse decision must be submitted in writing to the Clerk of the Board of Supervisors within seven (7) working days after mailing of the decision by the Director of Administrative Services.

The Director of Administrative Services shall discuss with County Counsel all protests and appeals before issuing a written decision.

If so requested as set forth in Section III - P (b) above, the Clerk of the Board of Supervisors shall schedule the appeal for hearing by the Board of Supervisors at a regularly scheduled meeting within twenty (20) working days from the date of receipt of the appeal. The decision of the Board of Supervisors is final.

### **III. TERMS AND CONDITIONS**

#### **Q. TERM / TERMINATION / RENEWAL**

1. The term of the contract, which may be awarded pursuant to this RFP, will be three (3) years.
2. By mutual agreement, any contract which may be awarded pursuant to this RFP, may be extended for two (2) additional one-year terms at agreed prices with all other terms and conditions remaining the same.

#### **R. QUANTITIES**

Quantities listed herein are annual estimates based on past usage and are not to be construed as a commitment. No minimum or maximum is guaranteed or implied.

#### **S. PRICING**

1. All pricing as quoted will remain firm for the term of any contract that may be awarded as a result of this RFP.
2. Unless otherwise stated, Bidder agrees that, in the event of a price decline, the benefit of such lower price shall be extended to the County.
3. All prices are to be F.O.B. destination. Any freight/delivery charges are to be included.
4. Any price increases or decreases for subsequent contract terms may be negotiated between Contractor and County only after completion of the initial term.

5. The prices quoted shall be the total cost the County will pay for this project including taxes and all other charges.
6. All prices quoted shall be in United States dollars and "whole cent," no cent fractions shall be used. There are no exceptions.
7. Bidder shall include a quote of time and materials and schedule of fees for additional work outside the scope of work requested in the bid form.
8. Price quotes shall include any and all payment incentives available to the County.
9. Bidders are advised that in the evaluation of cost, if applicable, it will be assumed that the unit price quoted is correct in the case of a discrepancy between the unit price and an extension.
10. Federal and State minimum wage laws apply. The County has no requirements for living wages. The County is not imposing any additional requirements regarding wages.
11. Prevailing Wages: Pursuant to Labor Code Sections 1770 et seq., Contractor shall pay to persons performing labor in and about Work provided for in Contract not less than the general prevailing rate of per diem wages for work of a similar character in the locality in which the Work is performed, and not less than the general prevailing rate of per diem wages for legal holiday and overtime work in said locality, which per diem wages shall not be less than the stipulated rates contained in a schedule thereof which has been ascertained and determined by the Director of the State Department of Industrial Relations to be the general prevailing rate of per diem wages for each craft or type of workman or mechanic needed to execute this contract.

T. AWARD

1. Proposals will be evaluated by a committee and will be ranked in accordance with the RFP section entitled "Evaluation Criteria/Selection Committee."
2. The committee will recommend award to the bidder who, in its opinion, has submitted the proposal that best serves the overall interests of the County and attains the highest overall point score. Award may not necessarily be made to the bidder with the lowest price.
3. The County reserves the right to reject any or all responses that materially differ from any terms contained in this RFP or from any Exhibits attached hereto, to waive informalities and minor irregularities in responses received, and to provide an opportunity for bidders to correct minor and immaterial errors contained in their

submissions. The decision as to what constitutes a minor irregularity shall be made solely at the discretion of the County.

4. The County reserves the right to award to a single or multiple contractors.
5. The County has the right to decline to award this contract or any part thereof for any reason.
6. Board approval to award a contract is required.
7. A contract must be negotiated, finalized, and signed by the intended awardee prior to Board approval.
8. Final Standard Services Agreement terms and conditions will be negotiated with the selected bidder. Bidders may access a copy of the Standard Services Agreement template using the hyperlink provided in Exhibit D. The template contains minimal Agreement boilerplate language only.
9. The RFP specifications, terms, conditions and Exhibits, RFP Addenda and Bidder's proposal, may be incorporated into and made a part of any contract that may be awarded as a result of this RFP.

U. INVOICING

1. Contractor shall invoice the requesting department, unless otherwise advised, in accordance with the payment milestones stated above and upon satisfactory receipt of product and/or performance of services.
2. Payment will be made within thirty (30) days following receipt of accurate invoice and upon complete satisfactory receipt of product and performance of services.
3. County shall notify Contractor of any adjustments required to invoice.
4. Invoices shall contain Contract Name, invoice number, remit to address and itemized products and/or services description and price as quoted and shall be accompanied by acceptable proof of delivery.
5. Contractor shall utilize standardized invoice upon request.
6. Invoices shall only be issued by the Contractor who is awarded a contract.
7. Payments will be issued to and invoices must be received from the same Contractor whose name is specified on the Contract.

Environmentally Friendly Packaging: Yuba County is an environmentally responsible employer and seeks all practical opportunities for waste reduction and recycling. The County, therefore, encourages its contractors to reduce waste volume and toxicity by using environmentally friendly packaging material whenever possible. Options may include backhauling product packaging to the supplier for reuse or recycling, shipping in bulk or reduced packaging, using soy bean-based inks for packaging printing, using recycled product packaging or using recyclable or reusable packaging material. The County encourages all bidders and contractors for goods and services to adhere to these principles where practicable.

V. ACCOUNT MANAGER/SUPPORT STAFF

1. Contractor shall provide a dedicated competent account manager who shall be responsible for the County account/contract. The account manager shall receive all orders from the County and shall be the primary contact for all issues regarding Bidder's response to this RFP and any contract which may arise pursuant to this RFP.
2. Contractor shall also provide adequate, competent support staff that shall be able to service the County during normal working hours, Monday through Friday. Such representative(s) shall be knowledgeable about the contract, products offered and able to identify and resolve quickly any issues including but not limited to order and invoicing problems.

W. GENERAL REQUIREMENTS

1. Proper conduct is expected of Contractor's personnel when on County premises. This includes adhering to no-smoking ordinances, the drug-free work place policy, not using alcoholic beverages and treating employees courteously.
2. County has the right to request removal of any Contractor employee or subcontractor who does not properly conduct himself/herself/itself or perform quality work.
3. Contractor personnel shall be easily identifiable as non-County employees (i.e., work uniforms, badges, etc.).
4. The County *will* require background checks of any personnel with unrestricted access to county physical sites, access to the County's employee data, or requiring logon access to County computer systems. Vendors should be prepared to have employees background checked at their own expense, upon request by County with copies of the results sent directly to the County. This would typically include fingerprinting and subsequent checks of Department of Justice and Federal Bureau of Investigation records. The cost of this type of back ground check differs

depending on where the check is initiated, but is typically less than \$100 per person.

**EXHIBIT A - BID FORM  
COUNTY OF YUBA  
RFP for Clerk Recorder System**

Cost shall be submitted on Exhibit A as is. No alterations or changes of any kind are permitted except where explicitly stated. Bid responses that do not comply will be subject to rejection in total. The cost quoted below shall include all taxes and all other charges and is the cost the County will pay for the term of any contract that is a result of this bid.

DESCRIPTION	UNIT OF MEASURE	ESTIMATED QUANTITY (A)	UNIT COST (B)	EXTENDED COST (C) (C=A*B)
<b>Clerk-Recorder System</b> Please provide the total price for one (1) complete system for use by <b>10-12</b> individuals including all software and installation necessary to meet the specifications and functionalities described in this RFP.	Each	1		
<b>User Access</b> Approximately 10-20 users would utilize a web based version for read-only access.	Each	30-40		
<b>Professional Services including Customization -</b> Bidders must insert an hourly rate and an estimated maximum number of hours required for their solution. The Extended Cost will be incorporated into any contract that may result from this RFP and will be the not-to-exceed amount for all professional services provided during the contract term.	Hour			
<b>CR System and Third Party Tools On-Going Service Maintenance Agreement Costs -</b> Bidders must provide the total three (3) year cost for all service maintenance agreements associated with their proposed system.	Annual	1		
<b>Training (including all training materials)</b>	Class			

\$

Subtotal \$

Applicable 7.50% Sales Tax \$

**GRAND TOTAL** \$

**Bidder agrees that the prices quoted are the maximum they will charge during the term of any contract awarded. County quantities listed herein are annual estimates and are not to be construed as a commitment. No minimum or maximum is guaranteed or implied.**

FIRM: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

**EXHIBIT B  
COUNTY OF YUBA  
RFP for Clerk Recorder System**

**BIDDERS STATEMENT**

By submitting a bid, the bidder acknowledges that he/she has acquainted themselves with the terms, scope, and requirements of the project based on the information contained in this RFP and any addendums. Any failure by the bidder to acquaint him or herself with available information will not relieve them from the responsibility of estimating properly the difficulty or cost of successfully performing the work. The County is not responsible for any conclusions or interpretations made by the bidder on the basis of the information made available by the County.

The following addendums have been acknowledged and are included in our proposal. RFPs that do not acknowledge addendums may be rejected.

Addendum#	Initials

\_\_\_\_\_  
COMPLETE LEGAL NAME OF COMPANY

\_\_\_\_\_  
BUSINESS ADDRESS, CITY, STATE, ZIP

\_\_\_\_\_  
PHONE NUMBER

\_\_\_\_\_  
PRINTED NAME OF AUTHORIZED AGENT (TITLE)

\_\_\_\_\_  
SIGNATURE OF AUTHORIZED AGENT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
FEDERAL IDENTIFICATION NUMBER

\_\_\_\_\_  
DUNS NUMBER

**THIS FORM TO BE COMPLETED BY CONTRACTOR AND INCLUDED IN THE BID.**

**EXHIBIT C  
COUNTY OF YUBA  
RFP for Clerk Recorder System**

**EXCEPTIONS, CLARIFICATIONS, AMENDMENTS**

Item No.	Reference To:		Description
	Page No.	Paragraph No.	

_____	_____	_____
<b>Bidder Name</b>	<b>Bidder Signature</b>	<b>Date</b>

**THIS FORM TO BE COMPLETED BY CONTRACTOR AND INCLUDED IN THE BID.**



**EXHIBIT D**  
**COUNTY OF YUBA**  
**RFP for Clerk Recorder System**

**STANDARD SERVICES AGREEMENT TEMPLATE**

The Standard Services Agreement template may be found online at:

<http://www.co.yuba.ca.us/departments/admin%20services/purchasing%20solicitaions.aspx>

In addition to the Standard Services Agreement, the County's Confidentiality Provisions are attached for reference.

Final contract terms and conditions will be negotiated with the awarded vendor

**THIS FORM TO BE COMPLETED BY CONTRACTOR AND INCLUDED IN THE BID.**

**EXHIBIT E**  
**COUNTY OF YUBA**  
**RFP for Clerk Recorder System**

**RESPONSE CONTENT AND SUBMITTALS**  
**COMPLETENESS CHECKLIST**

1. Bid responses must be signed in ink and include evidence that the person or persons signing the proposal is/are authorized to execute the proposal on behalf of the bidder.
2. Bidders shall provide all of the below noted Bid documentation and exhibits. Any material deviation from these requirements may be cause for rejection of the proposal, as determined in the County's sole discretion. The content and sequence for each required Bid document/exhibit shall be as follows:

CHECK LIST

- A. Title Page: Show RFP number and title, your company name and address, name of the contact person (for all matters regarding the RFP response), telephone number and proposal date.
- B. Table of Contents: Bid responses shall include a table of contents listing the individual sections of the proposal and their corresponding page numbers. Tabs should separate each of the individual sections.
- C. Cover Letter: Bid responses shall include a cover letter describing Bidder and include all of the following:
  - 1) The official name of Bidder;
  - 2) Bidder's organizational structure (e.g. corporation, partnership, limited liability company, etc.);
  - 3) The jurisdiction in which Bidder is organized and the date of such organization;
  - 4) The address of Bidder's headquarters, any local office involved in the Bid Proposal; and the address/location where the actual production of goods and/or services will be performed;
  - 5) Bidder's Federal Tax Identification Number;
  - 6) The name, address, telephone, fax numbers and e-mail address of the person(s) who will serve as the contact(s) to the County, with regards to the RFP response, with authorization to make representations on behalf of and to bind Bidder;
  - 7) A representation that Bidder is in good standing in the State of California and will have all necessary licenses, permits, certifications, approvals and authorizations necessary in order to perform all of its obligations in connection with this RFP.

This requirement includes the necessity for some out of state companies to be registered with the State of California by the effective date of the agreement. Information regarding this requirement can be located at the Secretary of State website, <http://www.sos.ca.gov/>; and

- 8) An acceptance of all conditions and requirements contained in this RFP.
- 9) Cover letter must be signed in ink by a person or persons authorized to execute the proposal on behalf of the bidder.

D. Letter of Transmittal: Bid responses shall include a description of Bidder's approach in providing its goods and/or services to the County in one (1) or two (2) pages stating its understanding of the work to be done and a positive commitment to perform the work as specified.

E. Executive Summary: A brief synopsis of the highlights of the Proposal and overall benefits of the Proposal to the County. This synopsis should not exceed three (3) pages in length and should be easily understood.

F. Bidder's Qualifications and Experience:

Provide a description of Bidder's capabilities pertaining to this RFP. This description should not exceed five (5) pages and should include a detailed summary of Bidder's experience relative to RFP requirements described herein, including references.

G. Key Personnel - Qualifications and Experience:

Bid responses shall include a complete list of and resumes for all key personnel associated with the RFP. This list must include all key personnel who will provide services/training to County staff and all key personnel who will provide maintenance and support services. For each person on the list, the following information shall be included:

- 1) The person's relationship with Bidder, including job title and years of employment with Bidder;
- 2) The role that the person will play in connection with the RFP;
- 3) Address, telephone, fax numbers, and e-mail address;
- 4) The person's educational background;
- 5) The person's relevant experience; and
- 6) Relevant awards, certificates or other achievements.

This section of the bid response should include no more than two (2) pages of information for each listed person.

H. Description of the Proposed Systems:

Bid responses shall include a description of the proposed systems, as it will be finally configured during the term of the contract. The description shall specify how the proposed system will meet or exceed the requirements of the County and shall explain any advantages that this proposed system would have over other possible systems. The description shall include any disadvantages or limitations that the County should be aware of in evaluating the proposal and must include a description of any product warranty that is included and the period covered.

I. Description of the Proposed Services as fully described in RFP, Section E (Specific Requirements):

Bidders are required to submit a description of the following proposed services:

1) Data Conversion/Migration Services

The conversion requirements include indexing and providing conversion services for data for the purpose of integration into the online system.

2) Training

Training for approximately Forty (40) individuals to cover full system functionality and additional classes for specialized areas. Minimum training content specifications and trainee counts for initial training are specified below.

- a) Up to 20 trainees - System training, all modules
- b) 3 trainees - Supervisor/Manager - Productivity and Workflow
- c) 2 trainees - System Administration/Technology
- d) 3 trainees - Accounting/Reporting
- e) 5 trainees - Public Search
- f) 5 trainees - Scanning

Bidders must specify the number of hours/days that will be dedicated to each of the areas and the course contents. If topics are covered in different course combinations, specify and describe the target audience. Bidders must also specify their plan for on-going and refresher training after system implementation. On-going and refresher training may be web-based, computer-based, or on-site. Bidders must provide all training materials as well as specify and coordinate set-up of equipment required for on-site training with the Clerk-Recorder's Office/Technology Services department

Bid responses shall include a description of the terms and conditions of services to be provided during the contract term including response times. The description shall contain a basis of estimate for services including its scheduled start and completion dates, the number of Bidder's and County personnel involved, and the number of hours scheduled for such personnel. Also, the description must: (1) specify how the services in the bid response will meet or exceed the requirements of the County; (2) explain any special resources, procedures or approaches that make the services of Bidder particularly advantageous to the County; and (3) identify any limitations or restrictions of Bidder in providing the services that the County should be aware of in evaluating its Response to this RFP.

J. Data Conversion/Migration Plan and Schedule:

The bid response shall include a conversion and migration plan and schedule.

K. References:

- 1) Bidders are to provide a list of five (5) current and five (5) former California clients. References must be satisfactory as deemed solely by County. References should have similar scope, volume and requirements to those outlined in these specifications, terms and conditions. References should have worked on projects with Bidder within the last seven (7) years.
- 2) Reference information is to include:
  - Company/Agency name
  - Contact person (name and title),
    - \* The contact person is to be someone who has agreed to provide a reference on Bidder and is/was directly involved with the system and/or service provided by Bidder.
  - Complete street address
  - Telephone number
  - Email Address
  - Type of business
  - Dates of service
- 3) The County may contact some or all of the references provided in order to determine Bidder's performance record on work similar to that described in this request. The County reserves the right to contact references other than those provided in the Response and to use the information gained from them in the evaluation process.
- 4) Bidder shall provide on a separate sheet(s), complete reference information for a minimum of two (2) public institutions or agencies for which it has provided comparable product, systems and services within the last two (2) years of the release date of this RFP. Each reference shall include the project name and location, the scope of services performed and the name, address, telephone and fax numbers of the person who may be contacted for reference information.

L. Bid Form, Exhibit A:

Cost shall be submitted on Exhibit A as is. No alterations or changes of any kind are permitted except where explicitly stated. Bid responses that do not comply will be subject to rejection in total. The cost quoted shall include all taxes and all other charges and is the cost the County will pay for the three (3) year term of any contract that is a result of this bid.

Bidder agrees that the prices quoted are the maximum they will charge during the term of any contract awarded. Listed quantities are annual estimates based on past usage and are not to be construed as a commitment. No minimum or maximum is guaranteed or implied.

M. Evidence of Insurance

Certificates of insurance are required from a reputable insurer evidencing all coverages required for the term of any contract that may be awarded pursuant to this RFP. The County's insurance requirements for Additional Insured reads, "All insurance required above with the exception... shall be endorsed to name as additional insured..." An endorsement is an amendment to a contract, such as an insurance policy, by which the original terms are changed. The insurance certificate (also known as the "Acord") carries a disclaimer, "This certificate is issued as a matter of information only and confers no rights upon the certificate holder. **This certificate does not amend, extend or alter the coverage afforded by the policy below.**" Additional insureds listed in the description box are not a proper risk transfer. Any amendment or extension of the coverage such as an additional insured should be provided by a separate endorsement page or copy of the policy

N. Other required Submittals/Exhibits not included above that are required in the bid response:

- Exhibit B, Acknowledgement form for the RFP and for each Addendum, must be signed and returned.
- Exhibit C, Exceptions, Clarifications and Amendments Form, must be completed and signed. Any exceptions, clarifications and amendments should also address the attached Exhibits (The County is under no obligation to accept any exceptions and such exceptions may be a basis for bid disqualification).

**THIS FORM TO BE COMPLETED BY CONTRACTOR AND INCLUDED IN THE BID.**

**EXHIBIT F**  
**COUNTY OF YUBA**  
**RFP for Clerk Recorder System**

**Recorder Interfaces**

Interface / System	Type of Interface	Expected Interface
<b>Required Interfaces</b>		
Image Replication	Batch	The county of Yuba is required by state regulation to maintain an official and public copy of each scanned document.
Kiosk Access	Application	The County allows the public to access document records through kiosks deployed in the Recorders office. These kiosks allow public users to view and print public records.
Document Scanning	Application	The County has allocated a machine to be used exclusively to scan documents in to the system. The county expects the solution to be packaged with a similar application, which is compatible with Fujitsu brand scanners.
Active Directory		The county uses Microsoft's Active Directory for authentication and role based access. The ability to maintain user control through active directory is recommended.
Megabyte Property Tax System	Batch	The Assessor's database system (Megabyte) utilizes recorded images that originate and are housed by the Recorder (Deeds, trusts, etc). In our current Recorder document management system a custom process was created in-house to copy images and index data to the Assessor's server. This process will need to be recreated in-house by granting access to the database tables, schemas and image files of the recorded documents.
Website Search	Browser	The County of Yuba currently provides the ability to search the public records index. The county expects the new system to provide similar functionality.
Vendor Access	VPN	Entities outside of the county are granted access to the County's image records based on subscription. The solution should provide a method for vendor's to access image documents. Application based access or FTP access are samples of acceptable methods.