



Douglas-Omaha Technology Commission
408 S. 18th Street
Omaha, NE 68102

Request for Proposal

Douglas County Land Records Management System RFP Project

May 20, 2009

Responses to this proposal are due by 11:00 a.m. CDST
on
Wednesday, June 17, 2009

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**GENERAL TERMS AND CONDITIONS
FOR
REQUEST FOR PROPOSAL**

Douglas County Land Records Management System

The Douglas-Omaha Technology Commission (DOT.Comm), with support from the Douglas County Board of Commissioners, invites proposals for a Land Records Management System for the Douglas County offices of the Register of Deeds, Clerk/Comptroller, Assessor and Treasurer. This Request for Proposal (RFP) is for software, installation, implementation and training, annual maintenance, and related services to be provided by the software provider and implementer.

I. General Information

The project coordinator designated as the official DOT.Comm representative and contact for this selection process is:

Deanna Hughes
DOT.Comm Client Manager
DOT.Comm
408 S. 18th Street
Omaha, NE 68102
dhughes@dotcomm.org
Phone: (402) 444-4735

Any explanation desired by a contractor/vendor regarding the meaning or interpretation of any RFP provision or questions must be submitted to Deanna Hughes, DOT.Comm Client Manager, no later than **5:00 p.m. CDST on Wednesday, June 3, 2009** and clearly marked "Questions for Douglas County Land Records Management System". Questions may be sent via **email only** to dhughes@dotcomm.org.

Explanations and answers to all questions will be posted as addendum on the DOT.Comm and Douglas County Purchasing Department web sites by the date posted in the Event Schedule.

DOT.Comm – www.dotcomm.org
Douglas County Purchasing – www.douglascountypurchasing.org

II. Event Schedule

The following is the proposed schedule for the selection project. DOT.Comm reserves the right to change the RFP schedule, issue amendments to the RFP, cancel the RFP, or reissue the RFP at any time.

RFP Published	Wednesday, May 20, 2009
Deadline for Submission of Questions	Wednesday, June 3, 2009 at 5:00 p.m.
Questions answered via web sites	Tuesday, June 9, 2009
Proposal Due Date	Wednesday, June 17, 2009 11:00 a.m. CDST
Short List Announcement	Wednesday, August 12, 2009
Pre- Demo Meetings for Short List Vendors	August/September 2009

Software Demonstrations – Short List Vendors	September 2009
Reference Checks, Customer/Other Site Visits	September 2009
Finalist Vendor(s) Selected	October 2009
Contract/s Finalized	November 2009
Project Start Date	January 2010
Project End Date	TBD

III. DOT.Comm Background

DOT.Comm was created by the Omaha City Council and the Douglas County Board of Commissioners by joint approval of an Interlocal Agreement. Commencing January 2, 2003, DOT.Comm has been conducting its operations. Through the execution of the Interlocal Agreement, the City of Omaha and Douglas County utilize DOT.Comm exclusively as the provider of electronic information, voice and data communication services for governmental operations and public services.

DOT.Comm has a staff of 100 programmers, analysts, developers, trainers, database administrators, system administrators, and support personnel. The departments within DOT.Comm include: Risk Management, Infrastructure, Business Applications and Client Services.

IV. Purpose and Objective

The Douglas County offices of the Register of Deeds, Clerk/Comptroller, Assessor and Treasurer, with support from the Douglas County Board of Commissioners and DOT.Comm, have entered into a joint project to search for a new Land Records Management system. Together these offices, with the assistance of a consultant, are seeking to evaluate Land Records Management systems and vendors that meet the requirements of the County and DOT.Comm for a fully integrated Land Records Management System.

The Douglas County offices began this effort by forming a Steering Committee to sponsor the project. A Project Team of subject matter experts, representing each property-related office as well as relevant City of Omaha departments, has been assembled. Discussions and analysis of current processes in each office has begun. Each of the four offices has specific duties related to land records management within Douglas County. Each office's duties are governed by Nebraska statutes. Any Land Records Management System must provide the flexibility for each office to meet their statutory duties. A brief description of the four Douglas County offices and their responsibilities follows:

- A. The Register of Deeds office is the first step of the lands-records-management process. It is responsible for the custody and safekeeping of all books, records, maps and papers filed in the office. Any written instrument potentially affecting title to real estate may be filed in the office of the Register of Deeds. The Register of Deeds office is required to maintain an alphabetical grantor and grantee index, a numerical index, and a record for every instrument recorded noting the time of delivery. All documents affecting real estate must include a complete legal description and be indexed against the property. Fees are collected for the filing of documents. The current indexing system is on an enterprise server and imaging is done using Kofax Content Manager. Averaging the last 10 years, the Register of Deeds office recorded approximately 140,000 documents per year and currently has more than 3 million recorded documents.
- B. The Douglas County Clerk/Comptroller has the statutory duty to create and deliver the tax rolls on an annual basis. They are required to make any change to the official electronic property record during the year, i.e., changes to the mailing address, legal description, ownership or valuation; to calculate the tax levies for each political subdivision; and comply with a number of state filing requirements. In addition, the County Clerk/Comptroller is responsible for managing the clerical side of the annual property valuation protest process including: scheduling appointments, tracking parcels and protest documents through the process, and keeping the paper and electronic records of action taken by the Board on these protests.

- C. The Douglas County Assessor is charged with keeping Real Estate and Personal Property Values updated in addition to meeting all other statutory requirements set by Nebraska State Law, i.e., Homestead Exemption, Permissive Exemptions, and Agricultural Greenbelt Exemptions. The Assessors Office currently utilizes CAMA (Computer Aided Mass Appraisal) software, maintains GIS (Geographic Information System) Cadastral Layers using ESRI Software and has a website, www.dccassessor.org, with parcel data and images. The Assessors Office anticipates establishing links for passing, updating and sharing data with the new Land Records Management System, and foresees moving the maintenance and sharing of Cadastral Layers into the new Land Records Management System linked with an Enterprise Geodatabase.
- D. The Douglas County Treasurer's office is responsible for the collection of all real and personal property taxes and the setup and maintenance of special assessments in Douglas County Nebraska. Once a year, the Treasurer creates and mails tax bills for each parcel in Douglas County and tax bills for each personal property account in Douglas County. Weekly, the Treasurer creates and mails bills for special assessments on parcels in Douglas County. The Treasurer also distributes the revenues from property taxes and special assessments to the appropriate taxing entity.

V. Current IT Environment

Douglas County is using Oracle for its Enterprise Resource Planning (ERP) software. The main integration that the Land Records Management System has with Oracle is to feed mainframe general ledger information to Oracle Financials. The County is not using Oracle for cash receipts and invoicing, but is using a combination of 3rd party software (such as QuickBooks and iNovah) and Excel spreadsheets to handle these functions, and to create the data for the journal entries. The data is then manually entered into Oracle Financials.

The following is a list of the main systems that comprise the County's current Land Records Management system:

- A. Oracle Financials (ERP)
- B. IMS Mainframe - multiple applications with ~26 different primary mainframe data stores many more secondary mainframe databases
- C. ESRI ArcGIS (GIS) – two independent systems and databases (one for the Assessor's Office and one for the rest of the County and the City of Omaha)
- D. RealWare (CAMA)
- E. Barcode (Time/Date Stamp of Documents)
- F. Kofax (Imaging and Indexing)
- G. iNovah (Point-of-Sale)
- H. WebFOCUS (Business Intelligence and Ad Hoc Reporting)
- I. Caspio (Form Builder/Basic Workflow)
- J. Accela (Permits)
- K. DocLanding (Content Manager)
- L. QuickBooks (Accounting and Billing)
- M. Cityworks (Public Works Infrastructure)
- N. Jaguar (Check Imaging)

The IMS Mainframe applications are the only ones which will be replaced with a new Land Records Management system, although some of the other applications may be replaced in the future if the County finds a better option (which could be a 3rd party solution or a module in the new system).

VI. Scope of Work

DOT.Comm is requesting proposals that will meet specific requirements. Below is a basic list of objects that must be minimally met.

The term Contractor and Vendor may be used interchangeably.

It is DOT.Comm's and Douglas County's desire to have an integrated system and one point of entry, allowing a consistent view of data from all of the modules and other disparate applications. Proposed vendors and their software must have experience working with counties similar in size and requirements with Douglas County and with a strong customer base using the proposed software. Custom software development proposals will not be considered as acceptable solutions for this project.

DOT.Comm will also consider application hosting as a part of system delivery if vendors are able to support this option. All vendors who have hosting availability are asked to complete Schedule 6 of the pricing matrix in Appendix C as well as submit more information concerning Hosting Partner information, Data Centers, Services offered, and other terms and specifications that would be useful in evaluation of your proposal.

The following is the scope of modules/functionality for this RFP:

Required Functionality/Modules	
Real and Personal Property Records Management	Special Assessments
Tax Billing and Collection	ESRI/GIS Integration
Report Writer	
*Out of Scope Functionality/Modules (May be considered in the future)	
Cash Receipting/Cashiering	Document Imaging
Computer Assisted Mass Appraisal (CAMA)	

These are not the primary focus of this RFP. However, consideration will be given to Vendors who can provide such functionality as part of a fully integrated suite of modules.

VII. User Counts

For the purpose of this RFP, please use the following user count estimates to develop your pricing:

Department	Total Users	Read Only Users (Not Included in Total Users Count)
Assessor	20	40
Clerk	6	12
Deeds	36	5
Treasurer	66	25
<i>Other Departments (Please list additional departments below)</i>		
DOT.Comm	15	5
Other County Dept. Users	0	90
Other City Dept. Users	0	65
Public Access (CPAN users)	0	275

VIII. Additional Services

Proposals should describe all types of services available from the organization and the standard hourly fees to be charged for such services.

IX. Evaluation of Proposals

Proposals will be evaluated to determine which one best meets the needs of DOT.Comm and the Douglas County offices of the Register of Deeds, Clerk/Comptroller, Assessor, and Treasurer. Evaluation and selection of Short Listed Vendors will be based on the information submitted in the proposal. Such evaluation may include, but is not limited to, scripted demonstrations, customer reference checks, clarification conference calls, clarification webinars, written communications or vendor headquarter visits. There may be further information required for clarification purposes after the proposals are submitted. After meeting the mandatory requirements, the proposals will be evaluated on their functionality, technology, support, total cost of ownership, contract terms and conditions, viability and strategic direction.

DOT.Comm reserves the right to accept or reject any or all proposals, or any part of any proposal, and to waive any defect or technicality, and to advertise for new proposals where the acceptance, rejection, waiver or advertisement would be in the best interest of DOT.Comm and the Douglas County offices. DOT.Comm also reserves the right to award in whole or in part, by items, group of items, or by section where such action serves the best interests of DOT.Comm and Douglas County.

At its discretion, DOT.Comm also reserves the right to select a different implementation services provider to perform implementation and training of the selected software including those that did not originally submit an RFP response provide software demonstrations to DOT.Comm and the County.

DOT.Comm also reserves the right for its contractors and consultants to participate in the evaluation of proposals, vendors, and software, and in the selection of the vendor(s) and software.

Complete and accurate responses to all items are necessary for fair evaluation of proposals. This RFP is not a commitment to purchase and any expenditure by the vendor in preparation and submission of the proposal shall not be reimbursed by DOT.Comm, nor does DOT.Comm obligate itself with any action taken or cost incurred by a vendor in responding to this RFP.

Members of DOT.Comm as well as members of the Douglas County offices of the Registrar of Deeds, the Clerk/Comptroller, the Assessor, and Treasurer will evaluate all proposals submitted in response to this RFP.

X. Proposal Disclosure and Confidentiality. In order to protect the integrity of the contracting process, proposals will not be disclosed until after award and signing of any and all contracts that may result from this RFP. All materials provided to DOT.Comm by the vendor are subject to the State of Nebraska public disclosure laws. Any information contained in the proposal that the vendor desires to claim as proprietary and exempt from disclosure must be clearly designated, including identifying the page and particular exception(s) from disclosure.

DOT.Comm will try to respect all material identified by the Vendor as being confidential, but requests that Vendors be highly selective as to what they mark as confidential. DOT.Comm will make a disclosure decision predicated upon applicable laws and can choose to disclose information despite its being marked as confidential and proprietary. Marking the entire proposal as proprietary or confidential, and, therefore, exempt from disclosure will NOT be accepted or honored, and may result in disclosure of the entire proposal or disqualification of the proposal solely at the discretion of DOT.Comm. Documents identified as confidential will not be treated as such if public disclosure laws take precedence, the information is publicly available, the information is already in DOT.Comm's possession, the information is obtained from third parties without restrictions on disclosure, the information is independently developed by DOT.Comm without reference to confidential information, or the information is required to be disclosed by order of a court or other governmental entity.

For further information regarding Nebraska Law for this section, please refer to Nebraska Revised Statutes, §84-712 et. seq.

XI. Submittal Requirements

Those Contractors/Vendors interested in responding to this RFP are required to submit their proposal in the following format. Strict adherence to the proposal format is required. Those submitting sealed proposals should indicate on the outside of the envelope in the lower left hand corner that it is a sealed proposal for the RFP – Douglas County Land Records Management System RFP Project. The name of the organization submitting the proposal should also be indicated on the outside of the envelope.

One (1) original and five (5) bound and sealed copies, plus one electronic copy in PDF format of the entire proposal will be accepted. In addition, one (1) copy each of the following appendices (Appendix A, B, D and E) should be received in Word file format, and one (1) copy of the pricing proposal (Appendix C) in Excel file format are to be delivered along with your hardcopy responses to:

Buster Brown, City Clerk
Omaha/Douglas Civic Center
1819 Farnam Street LC-1
Omaha, NE 68183-0011

Proposals must be received by **11:00 a.m. CDST on Wednesday, June 17, 2009**. Proposals received after 11:00 a.m. on June 17, 2009 will not be considered. The submittal format is as follows. It is requests that tabs be used to separate each section:

A. Title Page

Present the subject of your proposal, the name of your organization, local address of the office that will be installing the application, name of the contact person and the date.

B. Table of Contents

Present a clear and comprehensive identification of the contents of your proposal by section and by page number.

C. Letter of Transmittal

A signed letter of transmittal is required. Within this letter include statements to the following:

1. Your organization's understanding of the work to be accomplished.
2. That upon award of the contract, your organization will make a positive commitment to perform the implementation work within the scheduled time period.
3. A summary of the cost of service fee(s) to be charged for the work, and a statement indicating if fees are fixed, complete, inclusive or negotiable.
4. All proposals submitted are to be valid for period of 180 days after this proposal date.
5. The name of the individuals who will be authorized to make representations for your organization, their titles, addresses, and telephone numbers.
6. That the signatory of the transmittal letter has authority to bind your organization.

D. Company Profile Please complete the form in Appendix A and include it in this section.

1. A profile of your organization is required. The profile should include the following information:
 - a. Basic organizational information, such as, size of organization, how long in business, public or private entity, etc.
 - b. Whether your organization is local, regional, national, or international.
 - c. The location of the office from which the engagement is to be performed and a brief narration of the number of professional staff (i.e. managers, developers, analysts, etc.) employed at the office.
 - d. Describe the range of services provided by the office performing the engagement.
 - e. A listing of the other similar governmental customers that are using this proposed software.
2. Summary of your organization's qualifications (Not to exceed 5 pages). Provide a summary of your organization's expertise in the area of software development, support, implementation, training, etc. pertaining to the software submitted in the proposal (including any 3rd party systems included as a part of your bid). Submission of reports from industry analysts such as Gartner and Meta Group is encouraged if available. Include at least three (3) references where your organization provided similar methods using the same software at other businesses of similar size and complexity (the references must be using the same version of software that you are proposing). Highlight any and all government references. Include contact names, telephone numbers and addresses. Indicate the year and timeframe in which each

reference was engaged with your organization. See the enclosed form in Appendix E for submitting this information.

E. Approach to the Project (Limit to no more than 10 pages)

Please provide a detailed statement of your project management approach. In this statement provide a high-level project plan, along with expected deliverables and estimated timelines. A formal Statement of Work will be required for the project and agreed to by all parties prior to the commencement of work. It is also required that an agreed upon Statement of Work is completed before contract execution and included as part of the contract documents.

F. Proposed Costs

Provide costs using the worksheet schedule on the spreadsheet in Appendix C for all project deliverables. An electronic Excel file of the completed spreadsheet is required to be submitted to us as part of this proposal.

The selected vendor must be willing to negotiate the payment schedule based on the successful completion of project milestones, with a portion of the contract contingent upon project completion within the agreed upon project period.

Procurement policy prohibits DOT.Comm from paying for goods and services in advance of delivery.

Proposals will be reviewed more favorably that waive or discount the maintenance/support fee for the first year (since software is not in production yet).

There will be a fifteen percent (15%) holdback of professional services fees which will be paid upon final acceptance by DOT.Comm. DOT.Comm has sixty (60) days after the first productive use of the software ("go-live" date) to develop a list of errors and other non-conforming elements for the vendor to correct. Final acceptance will take place when DOT.Comm agrees in writing that the errors and non-conforming elements, except for minor inconsequential errors or elements, have been corrected, and such acceptance shall not be unreasonably withheld.

G. Specifications

Appendix B provides the specifications/functionality that must be met by the software application. Please provide an answer and any comments necessary to clarify the functionality and submit as requested.

Final product must be delivered within one hundred and eighty (180) days from contract execution.

H. Additional Data

Provide any other documentation necessary to describe the functionality/delivery of the proposed system. Vendors who submit pricing for Hosting fees (Section 6 of Appendix C) are asked to provide details about the level of hosting services provided (i.e. DBA, upgrade support, backup services, system monitoring, etc.), contractual terms (minimum contract length, performance guarantees, etc.), hardware related costs, infrastructure costs, and other items pertaining to this service. If such service is offered indirectly through a hosting partner DOT.Comm requests disclosure of the partner and terms of agreement between said partner and the software vendor.

The Short Listed Vendors will be asked to demonstrate their software to a customized demonstration script designed and developed by DOT.Comm and their Consultant, SoftResources. This script will be issued to Short Listed Vendors according to the timeline indicated in Section II. Event Schedule. Vendors may also provide any other information that they believe will assist DOT.Comm in making its selection.

I. Appendix D

Complete the form in Appendix D and include it in this section. **All exceptions must be on the form in Appendix D** even if they are stated elsewhere in this proposal. If Appendix D is not completed, it will be assumed that there are absolutely no exceptions to this proposal and will be treated as such.

J. Bid Proposal Signature Page (see form at the end of the main RFP).

This page should be signed by a duly authorized representative and submitted in original signed form with all hardcopy proposals submitted.

XII. Termination.

- A. DOT.Comm may terminate the contract at any time if the Contractor fails to carry out the terms or fails to make substantial progress toward the fulfillment of the contract obligations.
- B. In such event, DOT.Comm shall provide the Contractor with thirty (30) days written notice of conditions which endanger contract performance. If after such notice the Contractor fails to remedy these conditions, DOT.Comm may send a certified letter to the Contractor for immediate cancellation of the contract. In such event DOT.Comm would receive a pro-rated portion of the value of the performance bond depending on the value of the remaining portion of the contract.
- C. The contract may be terminated prior to the end of the contract period by mutual agreement of both parties by at least ninety (90) days written notice.

XIII. Insurance

The successful Contractor shall provide a certificate of insurance indicating, (1) adequate statutory Workers Compensation insurance; (2) Public Liability insurance in an amount of not less than \$1,000,000 for injuries including accidental death to any person and subject to the same limit to each person in an amount of not less than \$5,000,000 where more than one person is involved in any one accident; and (3) Property Damage insurance in an amount not less than \$500,000; and naming DOT.Comm as an additional insured for the term of the agreement.

XIV. Representations and Warranties.

The Contractor warrants that it is licensed as the owner of the Licensed System and that it has good and lawful authority to enter into this Agreement with Customer. The Contractor agrees to indemnify and hold Customer harmless from any patent or copyright infringement arising out of Customer's Use of the Licensed System Product(s) provided the Contractor is notified promptly in writing and is given all information required for defending or settling any charge of patent or copyright infringement or suit resulting there from.

In the event that any portion of the Licensed System Product(s) or related materials furnished to DOT.Comm (Customer) by the Contractor is likely to or does become the subject of a claim of infringement of a copyright or patent, the Contractor shall at its expense either:

- A. Procure for Customer the right to continue using the Licensed System Product(s) or related materials within ninety days (90) of notification of infringement,

- B. Modify or replace the Licensed System Product(s) or related materials to make them non-infringing without adversely affecting their operating specifications within ninety days (90) of notification of infringement, or
- C. Allow DOT.Comm to terminate this Agreement if sections A. or B. above cannot be satisfied and get a pro-rata refund of the fees paid based on a seven (7) year depreciation schedule starting from the "go-live" date.

XV. Service Performance Warranty.

The Contractor warrants that the services as described in this RFP will be performed diligently by experienced and competent professionals in a professional and workmanlike manner and with the requisite degree of care and skill exercised by members of the same profession practicing under the same or similar conditions and situations in accordance with all applicable professional standards.

XVI. Acceptance of Proposal Content. The contents of the proposal of the successful Contractor will become contractual obligations if procurement action ensues. Failure of the successful Contractor to accept these obligations in a contractual agreement may result in immediate cancellation of the award. DOT.Comm reserves the right to contract with another responding compliant Contractor.

Any reports, studies, photographs, negatives, data base information, computer programs or other documents or drawings prepared by the Contractor in the performance of its obligations under this contract shall be the exclusive property of DOT.Comm and all such materials shall be delivered to DOT.Comm by the Contractor upon completion, termination or cancellation of this contract. The Contractor shall not use, willingly allow, or cause to have such materials used for any purpose other than the performance of the Contractor's obligations under this contract without the prior written consent of DOT.Comm.

XVII. Term of Contract

The contract shall begin on the date both parties sign the contract. The term of the contract awarded in response to this RFP shall be five (5) years. At the option of DOT.Comm, there will be up to two (2) three (3) year extensions. Either party may provide written notice of termination to the other party ninety (90) days prior to the end of any term or subsequent renewal term. *(Years may vary depending on specific software)*

XVIII. Project Schedule

The successful Contractor will be required to provide a project and software schedule with the proposal which identifies complete installation of all equipment starting at a theoretical date which will be the formal notice to proceed date. Failure to meet this installation schedule will be grounds for withholding payment until the specific milestones are met. The installation schedule will be considered in evaluating the proposals. DOT.Comm reserves the right to change the installation schedule. If DOT.Comm changes the schedule for its own convenience, there will be no cost change to the Contractor for the change.

XIX. Drug Policy

Proposals will only be accepted from Contractors who have a Drug-Free Workplace policy. Contractors must submit a policy statement with their proposal.

XX. Independent Contractor

The Contractor hereby represents and agrees that it is engaged as an independent contractor and not as the agent, employee or servant of DOT.Comm; that it has and hereby retains the right to exercise control and supervision of the work and full control over the employment, directions, compensation, and discharge of all persons assisting it in the work; that it will be

solely responsible for wages (including withholding of income taxes and social security taxes, workers' compensation) compliance with NE/OSHA and all employment related regulations relating to its employees; and that it will be responsible for its own acts and those of its subordinates, employees and agents during the term of this Agreement. Contractor shall retain the exclusive right to hire and set the terms and conditions of employment for its employees including wages, hours, fringe benefits, duties, grievance procedures and labor relations matters. DOT.Comm shall not be considered a joint employer, joint venture or partner with The Contractor. All claims on behalf of any person arising out of employment or alleged employment – including without limit claims of discrimination against the Contractor, its officers or its agents – shall in no way be the responsibility of DOT.Comm; The Contractor will hold DOT.Comm harmless from any and all such claims. Such personnel or other persons shall not require nor be entitled to any compensation, rights or benefits from DOT.Comm, including without limit, tenure rights, medical and hospital care, sick and vacation leave, severance pay, and retirement benefits.

XXI. Non-Performance of Contract

Failure by the successful Contractor to provide or perform the services as specified in the contract will be considered non-performance. One or more of the following reasons will constitute non-performance.

- A. Failure to provide a person or persons for performance of the service as proposed in the Contractor's proposal. Substitutions may be permitted for causes considered appropriate by DOT.Comm. Any substitution must be approved in writing by DOT.Comm.
- B. Failure to initiate the service by the date specified in the technical specifications.
- C. Failure to satisfactorily complete the service by contractually established delivery dates.
- D. Any other factors as outlined in the specifications of the Request for Proposal.

XXII. Prime Contractor

If subcontractors are planned to be used, this should be clearly explained in the proposal. However, the prime contractor will be responsible for contract performance and payment whether or not subcontractors are used.

XXIII. News Releases

News releases pertaining to this procurement or any part of the proposal shall not be made without the prior approval of DOT.Comm. Violation of this paragraph may be grounds for disqualification of the Contractor's proposal.

XXIV. Contract Documents

The executed contract between the Contractor and DOT.Comm shall include this RFP, the Vendor's Proposal and any addenda.

XXV. Appendices

- A. COMPANY PROFILE
- B. FUNCTIONAL REQUIREMENTS
- C. SUMMARY PRICE PROPOSAL
- D. VENDOR EXCEPTIONS TO RFP
- E. CUSTOMER REFERENCE LIST

BID/PROPOSAL SIGNATURE PAGE

The below signed hereby agrees to furnish software and/or services at the price(s) and terms subject to all instructions, conditions, specifications addenda, and conditions contained in this RFP.

I have read the entire RFP and all attachments including the specifications and fully understand what is required to submit a bid for this proposal. By submitting this signed proposal I declare that I am a duly authorized representative to enter into a binding agreement with DOT.Comm, and will accept a contract if approved by DOT.Comm and Douglas County and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

Submitted

by: _____
(Signature) (Date)

Name (printed)

_____ Title: _____

Company: (Legal Registration)

Appendix A – Company Profile

DOT.Comm RFP for Douglas County Land Records Management System

Company Profile

This section contains the vendor information and response format that we would like you to present in “Section 4 - Company Profile” of your proposal.

Please complete this section, responding with a profile for each vendor and/or implementer being proposed in the RFP response. **This section must be submitted in Microsoft Word format. Changes to the template format or the font are not allowed.**

Vendor Executive Summary Response Chart	
Vendor and Software Information	
1. Contact Information	
§ Company Name	
§ Name and Title of Contact Person	
§ Address	
§ Phone, Fax, Email	
§ Company Website	
2. Regional Offices and Staff	
§ Describe whether your organization is local, regional, national or international.	
§ Regional offices closest to our location	
§ Describe the range of services provided by the office performing the engagement.	
3. Company Information	
§ Year Founded	
§ Private vs. Public (Listing Exchange and Listing Code)	
§ Fiscal year end	
§ Revenue: Current Year	
§ Revenue: Prior Year	
§ Net Income/Loss: Current Year	
§ Net Income/Loss: Prior Year	
§ Parent Company (If separate)	
§ Genealogy of Organization (Changing business, name changes, acquisitions/mergers, etc.)	
§ Describe if your organization is international, national, regional or local. Please explain.	

§ Describe how the company has grown. “Organically,” thru acquisition, thru mergers, etc.?	
§ Are there any planned acquisitions or mergers in the future?	
§ Disclose any recent litigation (and outcomes) and litigation currently underway.	
4. # of Vendor Employees	
§ Total Worldwide	
§ # dedicated to the proposed software	
§ U.S. # dedicated to the proposed software	
§ Location of office that will be supporting us & # of employees	
5. Number of Customers Using the Proposed Software	
§ Total Worldwide	
§ # cities and counties using the proposed software	
§ # cities and counties using the proposed version	
6. List governmental customers similar to Douglas County, Nebraska (similar requirements, applications, size, users and modules)	
7. Vendor’s Target User Profile	
§ Industries/Segments	
§ Target: # of citizens and operating budget	
§ Customer “Sweet Spot” Sizing	
8. Implementation Model – Direct, VAR, Implementation Partner, etc.	
9. Version Schedule	
§ Current version and general availability release date	
§ Proposed version & general availability release date	
§ Estimated release date for next version	
§ Typical release schedule & time to install	
§ Number of prior versions supported	
10. User protection plans (e.g. source code held in Escrow, no charge to migrate to a new version or software, etc.). Briefly describe.	

Appendix B – Functional Requirements

DOT.Comm RFP for Douglas County Land Records Management System

INSTRUCTIONS FOR COMPLETING FUNCTIONAL REQUIREMENTS

1) Vendor Response

For each numbered line item requirement, the vendor must indicate in the “Vendor Response” column Y, 3P, C, F, or N, according to the following legend:

Y	Fully supported by the current release of the software.
3P	Supported with third party software (i.e. software not directly owned or controlled by the vendor submitting the proposal).
C	Customization is required to meet the requirement (e.g. changes to the underlying code must be made; a new table must be created; etc.) This causes additional upgrade work in order to implement new versions or upgrades.
F	Future functionality: Supported in the next release of the software.
N	Not supported.

Place an appropriate ü mark or X in the corresponding column for each requirement.

- 2) If the vendor responds with 3P, C, or F, the vendor **must** provide additional information in the comments column:
- § For “**3P**”, the vendor must explain what third party software application or service is required, any integration requirements, and the vendor's relationship with this third party.
 - § For “**C**”, the vendor must explain the nature and amount of customization required, and experience with the same or similar modifications.
 - § For “**F**”, the vendor must explain the functionality in the new release, the expected general availability release timing and provide surety that the functionality will be included.
- 3) The vendor must also identify which module(s) the required functionality is part of in the final column when applicable if functionality overlaps multiple functional areas/modules.

This information must be completed and submitted in the format provided. Please do not modify the format or font settings of this template.

Douglas County/DOT.Comm – Appendix B System Requirements

Please submit electronically in Word format. Do not modify template or font.

	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
R	General Requirements						
R	1. Capture all of the data on the Nebraska Real Estate Transfer Statement (grantor, grantee, property type, deed type, type of transfer, legal description, deed book, deed page, etc.) This transfer statement will be seamlessly available to the other offices, through workflow, and ready for electronic transfer to external sources.						
R	2. Ability to archive and quickly access over 3 million recorded documents, and to efficiently process an average of 140,000 documents through the Register of Deeds office a year.						
R	3. Single entry for data (once data has been entered, such as grantor name and address, this information does not need to be entered again into the system unless there's a change or correction).						
R	4. Complete system audit trail with activity to be tracked by user and workstation (tracks every change made to each field). Ability to configure audit trail in specific areas of the application to accommodate the ability to measure accuracy for individual employees to include original entry and the change(s) made.						
I	5. Ability to create, within workflow, verification steps as required to ensure accuracy.						
R	6. User configurable menus, fields and screens.						
I	7. Unlimited customer definable fields.						
I	8. Unlimited customer definable attribute or dimension fields (e.g. to show relationship of SID, taxing districts, special assessment categories to parcels and lots.)						
R	9. Drill down throughout all modules to source document and transaction level details.						
I	10. Full search capability including multi-tier, wild card, "contains", and Boolean. E.g. if "Fo" is keyed into for street search, the system will pull in all streets starting with "Fo" such as Fort, Folsom, Foundry, etc. Also, search for partial address; "4220" pulls in all streets with a "4220" address. Briefly discuss your capabilities.						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
R	11. Rules based routing workflow: unlimited horizontal routing, route to least 3 hierarchical approval levels. (Paperless workflow.)						
R	12. Rules-based workflow: Date, variance and action triggers, alerts, flags, and messaging.						
I	13. Online ability for constituents to file a protest of the valuation with routing of protest to appropriate departments for review, input and approval.						
R	14. Visibility of information across departments (online, real-time).						
R	15. User defined queries with wild card search and filters						
R	16. Customer definable drop down lists or other methods to facilitate look-up and data entry.						
R	17. Attach scanned images, electronic documents or PDF file to fields or records.						
R	18. Mask/redact customer identified fields; e.g., hide social security # or owner phone number. (Include the ability to redact (mask) documents and images, both manually and automatically.)						
R	19. Ability to view history for any item (parcel #, account #, address, taxpayer or owner.)						
N	20. Drill down and across to transaction level details, including in 3 rd party systems.						
I	21. Real-time address standardization with verification against a single source (e.g. USPS).						
R	Technology						
I	22. "Real time" system and reporting.						
R	23. Required - Security to menu and screen by group or user. Important - Field and row level security via Active Directory.						
R	24. Security, which is Microsoft Active Directory Compliant, including password encryption						
R	25. Screen access controlled at Administration level within various Business Units (controlled user level) for internal and external users.						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
I	26. Administrative rights to the database for access when creating/writing reports						
R	27. ODBC, DDE and OLE compliant.						
R	28. SMTP, POP3, IMAP and MAPI compliant.						
R	29. Fax and email reports from the system.						
I	30. Bi-directional integration with Excel, Access and Word.						
R	31. Ability to use and create bar codes and 2D bar codes (e.g., instrument number, book/page numbers, recording fees, documentary stamp fees, certification seal, etc.)						
R	32. Remote access via Internet. Preference for web-enabled application. Web-based application Nice-to-Have. Briefly discuss your capabilities and plans to be fully Web-based.						
I	33. Describe experience integrating/interfacing with these types of application: - Current applications: - ESRI ArcGIS (GIS) - RealWare (CAMA) - Barcode (Time/Date Stamp of Documents) - Kofax (Imaging and Indexing) - iNovah (Point-of-Sale) - WebFOCUS (BI & Ad Hoc Report Writer) - Caspio (Form Builder/Basic Workflow) - Accela (Permits) - DocLanding (Content Manager) - QuickBooks (Accounting & Billing) - Cityworks (Public Works Infrastructure) - Oracle Financials (ERP) - Jaguar (Check Imaging) - Crystal Reports						
R	34. Open architecture with published APIs.						

Douglas County/DOT.Comm – Appendix B System Requirements

Please submit electronically in Word format. Do not modify template or font.

	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
I	35. Integration and development tools for user system administrator. Briefly describe.						
I	36. Pointers/hotlinks to external databases/applications to extract data.						
N	37. Community portal or “Mash-up” technology to include county clerk/comptroller, assessor, GIS, treasurer (tax) and register of deeds websites and data. Briefly describe.						
R	38. Ability to make changes to all fields in the system, preserving history for a “snapshot in time” look at any parcel, record, legal description, ownership, etc. Ability to search and retrieve “time snapshot” (e.g. information for that lot on March 1, 2001).						
R	39. Application and external web interface must be accessible via both Windows and Mac products, using a variety of operating systems, (Windows 2000, XP and Vista), and a variety of web browsers (IE 6 and higher, AOL 9, Firefox 1/x3.x, Opera 9.x and Safari 3.x)						
R	40. Application and web interface must have 24/7 accessibility						
R	41. External web interface the meets the Americans with Disabilities standards(ADA compliance)						
R	42. Ability to define search options on external web site and modify as needed to meet needs of customers						
R	43. Provide full system documentation; e.g., electronic and printed technical, operational, testing, and user manuals						
R	44. Integrate with third party vendor to provide for secure transaction processing for payments						
R	45. Ability to fully test entire system prior to implementation and prior to maintenance/updates.						
N	46. Ability to assign documents for processing to a specific user; e.g., when training a new employee, the employee's recordings go into the trainer's work queue						
R	Software Technology Overview						
	47. Platforms Supported & % of total						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
	48. Databases Supported & % of total						
	49. Development Tools						
	50. Programming Language - Source Code/Kernel - Applications Layer - Presentation Layer - Other						
	51. Describe your backup, reliability and disaster recovery capabilities						
R	Version Releases						
	52. Current Version and Release Date:						
	53. Proposed Version and Release Date:						
	54. Typical release schedule (e.g. every 18 mos.):						
	55. Time to implement average releases and upgrades:						
	56. Number of prior versions supported:						
R	Modules/Functionality (Identify 3rd party vendors and partnerships.)						
R	57. Real and Personal Property Records Management						
R	58. Special Assessments						
R	59. Tax Billing and Collection						
R	60. Cash Receipting/Cashiering						
R	61. ESRI GIS Integration						
R	62. Report Writer						
R	63. Document Imaging						
E	64. Computer Assisted Mass Appraisal (CAMA)						
R	Real and Personal Property Records Management						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
I	65. Flexibility to link multiple addresses, lots, parcels, plats, subdivisions, taxing districts, political subdivisions, addresses, accounts, ESRI GIS maps/data/layers and owners together in a single master database.						
R	66. One-to-many relationships for parcel id with multiple addresses (e.g. strip mall).						
R	67. Handle property classifications and changes made due to tax status (exempt, non-exempt, government property, homestead, etc.).						
R	68. Track property by several user-definable identifiers including: parcel number, lot number, development I.D., geonumber, address (whole/ partial search, e.g. house number), owner(s), latitude/longitude, etc. (Support alpha-numeric).						
R	69. Ability to link property by more than one field to property records and related data in other systems (e.g. parcel number and/or lot number and/or name with CAMA and GIS layers).						
I	70. Electronic alerts and notifications to multiple departments at specified points of the process (e.g. foreclosures of real property).						
R	71. Unlimited history of real property valuation.						
R	72. Unlimited history of personal property information and valuation.						
R	73. Track mobile home records (owner(s), I.D. #, V.I.N, etc.). Currently titled as vehicle (personal property), and has taxing and billing cycle rules independent of the current real and personal property cycles, but property classification may change.						
I	74. Ability to track improvements on leased land (e.g track cabins built on leased property).						
R	75. Track unlimited number of owners (name, contact information, mailing address), type of owner (trust, corporation, individual, etc.) and owner status (primary, % ownership, etc.)						
R	76. Electronic document routing and routing status for additional information input and approvals (e.g. Transfer Statement).						
R	77. Definable identifier fields including: instrument #, title information, ownership/valuation, legal description,						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
	change history unique parcel identifier, etc.						
R	78. Parcel descriptions: Street Address, Taxpayer and Owner(s), Recent Activity, Last Date Evaluated, Improvement Assessment, Land Assessment, Total Assessment, relationship to parent/child parcel, Brief Legal Description (with drilldown to full legal description), class, agricultural information, etc.						
R	79. Electronic indexing of land records/deeds by legal description, I.D., location, address(es), names and time/date of filing, document date, date that original documents are returned to sender, and who picked up the records.						
I	80. Attach documents/images to any field within the system.						
R	81. Ability to define legal description down to the quarter/quarter within the section (for lands only) and lot/block (for platted additions).						
R	82. Public access to limited deeds information through kiosk or web and with login/password security read-only remote access from office (e.g. Lenders, Mortgage Companies, etc.). Subscription fee for access to certain reports and complete information. "Read-only" format for images and history available outside register of deeds office.						
R	83. Electronic exception reporting for documents that are rejected due to incomplete/inaccurate information and forms, missing signatures and non-payment.						
I	84. Customer definable alerts such as for ownership changes, business name changes, new businesses acquired by certain individuals or corporations, property sales, etc.						
R	85. Integration with CAMA to provide assessment information based on security authorization level.						
I	86. Visibility of customer defined itemized valuation changes to property (e.g. value changes for a property with 8 buildings, each building should have a valuation and the system should calculate the total approved overall valuation for the property).						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
R	87. When property record is selected, show all associated documentation based on access security level.						
I	88. Administer and track tax exemptions.						
I	89. Ability to maintain different versions of a property parcel record; e.g., a protest is filed during the annual protest process, dismissed by the Board, and subsequently an appeal is filed with the State of Nebraska's TERC. The TERC process can take 2-3 years to complete. In the meantime, the property is split into two parcels or combined with another property. For us to process this, we have to do the split/combination in order to get a correct tax record for the year(s) we are waiting for the TERC process to be complete. Then, when we get the ruling, we undo the split/combination, apply the approved TERC value for that year, generate a corrected tax statement and re-do the split/combination.						
R	Special Assessments						
R	90. Track and administer multiple types of special assessments for an account or property.						
R	91. Flexibility to administer and track flat fee or variable payments, and calculate different monthly and/or yearly interest rates for a time period defined by the authorized system user.						
R	92. Identify special assessment codes with unlimited alphanumeric character description fields.						
R	93. Track special assessments for all types of property (e.g. Mobile Homes, Commercial Accounts and Residential Properties).						
I	94. Manage and track special assessment calculation formulas, including penalty fees, interest and administrative charges.						
R	95. Mass Entry and Global change administration.						
R	96. Enforce appropriate Tax Rules.						
I	97. User-definable pull-down screens (e.g. to display special assessment regulations, category definitions and codes, etc.)						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
R	98. Visibility of complete Valuation Data for each Property.						
R	99. Complete Audit History and Reporting for other departments and agencies.						
I	100. Flexibility to do a consolidated invoice of all special assessments and taxes on multiple properties owned by one person or entity.						
N	101. "Click" drill down from line item special assessment to the transaction level detail (e.g. to see the formula and valuation basis used to calculate that special assessment, related documentation, etc.)						
R	Tax Billing and Collection						
R	102. Flexibility to handle and administer customer defined rules and formulas. (e.g. 10% discount if the quarterly payments are paid in advance)						
R	103. Describe your experience with configuring the application to comply with State and Local tax and billing regulations, (describe any specific experience with Nebraska tax and billing regulations.)						
R	104. Bill for all types of property tax transactions and levies (real and personal property tax).						
R	105. Accelerate tax bill process for full payment upon property sale. Alerts and reports of sales and pending sales.						
R	106. Maintain separate records (name(s), addresses, phone email) for property owner and taxpayer for a property and manage invoicing and payment tracking (e.g. a property management firm may receive the invoices and pay the taxes for a property owned by a different corporation located at a different address).						
R	107. Handle real property and personal property billing (for real property the bill follows the property; for personal property, mobile homes and leased land the bill follows the owner).						
R	108. Taxpayer access to online bill and related charges information.						
R	109. Provide itemized tax bills.						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
R	110. Consolidate bills into one statement for owners who own multiple properties.						
R	111. Generate tax rolls.						
R	112. Calculate tax/ levies for each political entity by fund using total valuation and budget submitted and tie to taxing district.						
R	113. Account for and manage tax payments and delinquent accounts.						
N	114. Ability to receive payment for multiple transactions (e.g. Marriage License, Property tax, Utility bill, etc.)						
I	115. Levy management & calculation: Calculate and administer levies and taxes with separate definable calculations to support 500+ (unlimited) taxing districts, and 220+ (unlimited) political subdivisions (schools, fire districts, SIDs, and cities.)						
R	116. Lien Management: Ability to carry multiple liens by multiple owners on a single property. E.g. property tax lien, construction/mechanics lien, IRS lien, and special assessments lien.						
I	117. Tax Lien Management: Consolidate tax liens for multiple years on a single tax bill.						
R	118. Alerts and notifications for filings or appeals that affect account, tax bill or payment (e.g. property valuation in the appeal process with TERC -Tax Equalization and Review Committee).						
I	119. Retain records by property of TERC filings, including after a property split and/or combination.						
I	120. Manage and generate distress warrants. Delinquent accounts past due longer than customer defined thresholds trigger creation of distress warrant. Account information automatically populated on distress warrant and cross-checked/synchronized with exceptions.						
I	121. Customer definable billing parameters: Flexible handling of interest calculations on balance due and payment schedule (e.g. set up schedule of multiple payments with interest added).						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
N	122. User defined dunning notices and levels.						
N	123. Call center functionality (e.g. call logs, account details retrieval, etc.) to handle customer service issues. Discuss ability to set up multiple independent call centers.						
R	124. Manage and track foreclosure.						
I	Cash Receipting/Cashiering						
R	125. Ability to apply cash receipts on hierarchical basis (i.e. penalties, then interest, then misc. fees, etc.) or to override the rules and apply cash based on constituent or department direction.						
I	126. Handle payment for multiple bills and items in one transaction and generate one consolidated receipt (e.g. special assessments, property tax and motor vehicle payment on the same receipt.)						
R	127. Ability to accept multiple payment methods; e.g., cash, check, accounts receivables, credit card, debit card, ACH Debit, point-of-purchase check conversion, and/or electronic funds on a single transaction.						
R	128. Accommodate multiple forms of payment: credit card, ACH, wire transfer, check.						
R	129. Integrate offline payments. (E.g. lock box, IVR phone payment, etc.)						
R	130. Provide detailed receipts.						
R	131. Sort payments by type: cash, check, credit card, etc.						
R	132. Sort payments by account, property classification, special assessment, aged payment due, and other customer definable reporting requirements. Sort by document type and documentary stamp tax						
R	133. The ability to assign revenue codes for the allocation to a financial information system all system transactions; e.g., general ledger account, accounting date, payment details, etc.						
R	134. "Real-time" update of payments to account and property records.						
R	135. Online payment and receipt generation. Utilize various forms of secure online						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
	payment systems; e.g., escrow accounts, credit card, ACH.						
R	136. Describe experience integrating with an MS SQL Server based iNovah (cashiering system) and similar systems.						
R	137. Ability to utilize the cashiering functionality of the application for some offices (ROD), while not required for all offices (Tr.).						
R	ESRI GIS Integration						
R	138. Describe your experience integrating with ESRI's ArcGIS and experience with ESRI's ArcServer.						
I	139. Describe the depth of integration your software has with ESRI's various ArcGIS software packages and what ability you have to exchange or link data. Are GIS layers pulled into your system to allow for drill down to a selectable layer level?						
I	140. Bi-directional import/export of data with ESRI's ArcGIS.						
N	141. Does your software provide for any customized editing capability for the editing and maintenance of GIS layers (this would be something above and beyond the standard out-of-the-box ESRI editing tools)? Would it interface with layers stored in the ArcServer MS SQL database?						
N	142. Ability to pass information on each cadastral layer on a "real-time" basis even to multiple Web sites.						
I	143. Preserve history of previous layers for comparisons and tax changes.						
R	144. Ability for data import/export with multiple GIS systems.						
I	145. Share layer data with other GIS systems based on security-based authorization levels.						
R	Report Writer						
R	146. Describe your reporting tools and their level of integration with all modules.						
R	147. End-user Ad hoc report writer. Describe your capabilities.						
R	148. Describe database access for end-user report writing. Our end-users want their own						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
	ability to create reports. Please describe.						
I	149. Ability to report on any combination of modules and fields in the database and attach a GIS map to the report.						
I	150. Launch reports and queries from within the application.						
I	151. Generate reports based on user-defined parameters such as date-range parameter or point-in-time reporting.						
I	152. Flexible report formatting. User-designed formats.						
N	153. Online Analytic Processing (OLAP) analytic reporting capabilities. How many pre-configured cubes are provided with the software? Does your software have the ability to display results on a GIS map, charts and graphs, and include in a report (e.g. a color ramp of home sales in an area or subdivision vs. assessed values.						
I	154. Report publishing options including but not limited to Excel, PDF, HTML, etc.						
I	155. Allow modification to Report in report preview mode.						
I	156. Ability to limit the number of records in report preview mode.						
E	Document Imaging (Currently Using Kofax/DocLanding/Jaguar)						
R	157. Scan document (single and multiple) into system as received or at any point in processing.						
R	158. OCR and ICR capability to produce equivalent text in machine readable format. Populate applicable system fields with OCR/ICR transformed data; e.g., attachments to the deed concerning personal property						
I	159. Full text index and search functionality.						
R	160. Apply customer definable document “tags” to scanned documents (ID, date/time, # of pages, etc.)						
I	161. Support storage of Check 21 images.						
R	162. Ability to import all current data and images (DocLanding project in progress)						

Douglas County/DOT.Comm – Appendix B System Requirements

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
E	Computer Assisted Mass Appraisal (CAMA)						
R	163. Describe experience integrating with CAMA software. The Douglas County Assessor is currently on an Oracle based RealWare CAMA system. Describe your experience in integrating with like systems.						
R	164. Describe your CAMA functionality and capabilities.						
R	Timing Desk Module						
R	165. Ability to track documents by method received; e.g., walk-in, mail, e-recorded, etc.						
N	166. Integration across multiple sites, keeping timing sequence in line, while identifying location; real-time synchronization						
R	167. Sequential 10-digit numbering system with date/time stamp down to the millisecond (on small bar code or electronic barcode)						
R	168. Capture statistical information at the time of recording documents (location, mail, walk-in). This cumulative information needs to be available during the day and historically for analysis purposes.						
R	Indexing Module						
R	169. Cashiering functions integrated with indexing and scanning function where payment is required before official posting of indexes and acceptance of "final" scan.						
R	170. Scanning process to integrate with third party image storage solution, DocLanding (includes archival functions).						
R	171. Availability of pending document files (images, data, etc.) for both internal and external searches.						
N	172. Ability to "copy/paste" data from image to index fields						
R	173. Ability to differentiate between corporation/organization names vs. individual names, and index appropriately without staff intervention (auto indexing).						
R	174. Electronic recording (eRecording, based on Property Records Industry Association						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
	standards) of documents to include: receipt, recording, indexing data, return of documents electronically, acceptance of payment electronically, and return of rejected documents to include reason(s) for the rejection.						
R	175. Access to images immediately after releasing						
R	176. Ability to process a daily average volume of 1,500 documents per day						
R	177. Ability of recorder to see customer escrow balance when recording						
R	Retrieval Module and Public Access						
R	178. Tiered fee structure for web access by citizens and businesses.						
R	179. Provisioning available to Register of Deeds administrator for enabling subscriber accounts (with configurable groups and data fields)						
R	180. Complete audit and reporting functions for external users (subscribers) providing statistical reporting on access and use.						
R	181. Revenue generated from subscribers stays with County – no revenue sharing.						
R	182. “Read-only” format for images and history available outside register of deeds office for external user.						
R	183. Ability to interface with future index book search application (holding records prior to 1989)						
R	184. Vendor provided, secured access portal (SSL), reliable, subscriber-based, server-to-client connection						
R	185. Subscriber will login with user ID and encrypted password credentials for data access.						
R	186. Subscriber to connect (via new web page) to existing Register of Deeds web site.						
R	187. Subscriber ability to request either a hardcopy or electronic copy of an image (identified through index book) where image is only available on microfilm. Ability for internal users to export images in .pdf						

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	Please check appropriate box for each requirement	Y	3P	C	F	N	Comments (Requirement for 3P, C & F)
I	188. Ability to view, manage, reconcile, and automatically replenish escrow accounts online for subscribers						
R	Administration Module						
R	189. Productivity reports by internal user ids						
R	190. Access list reporting						
R	191. Ability to expunge (permanently delete) documents						
N	192. Ability to electronically apply a signature to a document						
N	193. Ability to apply a digital “certified copy” stamp to a document, add a signature, and/or print the document or email it to a customer						
I	194. Ability to imbed (“burn in”) information onto images; e.g., instrument number, book/page numbers, barcode, recording fees, documentary stamp fees, certification seal, etc.						

Appendix C Price Proposal

Appendix C:

Vendor Name: _____

Schedule 1: Summary Price Proposal

Summary of Total Software, Professional Services, and Annual Maintenance Costs

Cost Categories	Proposed Cost	Explanation / Notes (if necessary)
Software License Fees (Schedule 2)	\$0.00	
Professional Services:		
Implementation Services (Schedule 3)	\$0.00	
Data Conversion (Schedule 3)	\$0.00	
Interface Estimate (Schedule 3)	\$0.00	
Business Process Re-engineering (Schedule 3)	\$0.00	
Training (Schedule 4)	\$0.00	
Travel and Other Costs (Schedule 5)	\$0.00	
Hosting Fees (Schedule 6)	\$0.00	
Subtotal Professional Services	\$0.00	
Database Costs (if any)		
Hardware Costs (if any)		
Total Cost During Project Period	\$0.00	
Ongoing Maintenance & Support	Proposed Cost	
Year One	0	
Year Two		
Year Three		
Year Four		
Year Five		
Total 5 Years Maintenance & Support	\$0.00	

PLEASE CHECK ALL FORMULAS

Appendix C Price Proposal

Schedule 2: Licensing Fees

Vendor Name:

Detailed Licensing Fees by Module

Module	Proposed Cost	Fee Per User	Explanation / Notes (if necessary)
*Modules/Functionality:			
Real and Personal Property Records Management			
Special Assessments			
Tax Billing and Collection			
ESRI GIS Integration			
Report Writer			
Document Imaging			
Timing Desk			
Indexing			
Retrieval and Public Access			
Other:			
Modules/Functionality Software Subtotal	\$0.00		
Third-Party Software (List individually):			
Third-Party Software Subtotal	\$0.00		
List Price	\$0.00		
Less Discount			
Total License Fees	\$0.00		

*** NOTE:** List the modules/functionality components needed to meet the requirements. Please include all modules, suites, tools, 3rd party applications, etc. that we will need to meet our requirements with your solution. Please include a separate spreadsheet (call it Optional Modules/Functionality) for all other functionality (modules, suites, tools, etc.) that you have, but are not proposing so we can see if there may be other modules that we should be considering.

Appendix C
Price Proposal

Schedule 3: Professional Services - Supplier Hours & Rate,
and Assumptions for [Customer's] Hourly Participation

Vendor Name:

Estimated Professional Services - Group by phases and identify phases if you feel it is appropriate

1. Estimated Supplier Hours & Cost

Activity Phase:	Data Conversion			Interfaces			All Other Implementation Services			Business Process Re-engineering			Total	
	Hours	Rate	Cost	Hours	Rate	Cost	Hours	Rate	Cost	Hours	Rate	Cost	Hours	Cost
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
			0.00			0.00			0.00			0.00	0	0.00
(add additional cells as needed)			0.00			0.00			0.00			0.00	0	0.00
Total	0		\$0.00	0		\$0.00	0		\$0.00	0		\$0.00	0	\$0.00

2. Assumed [Customer] Hourly Participation (Please input the estimated "Hours" only that you are assuming from [Customer] for this project)

Activity Phase:	Data Conversion		Interfaces		All Other Implementation Services		Business Process Re-engineering			Total	
	Hours		Hours		Hours		Hours			Hours	
										0	
										0	
										0	
										0	
										0	
										0	
										0	
										0	
										0	
										0	
										0	
(add additional cells as needed)										0	
Total	0		0		0		0			0	

Appendix C

Price Proposal

Schedule 4: Training Costs

Estimated Cost of Training by Phase

Vendor Name:

1. Training Hours and Costs by Trainee Type or Course

Phase Trainee Type/Course	Number of Students	Phase I				Phase II				Phase III				Total		
		Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours	Cost
(add additional cells as needed)																
Total	0	0			\$0.00	0			\$0.00	0			\$0.00	0	0	\$0.00

****Please label each phase consistent with your implementation methodology***

2. Additional Training Costs (including on-going)

Phase Trainee Type/Course	Number of Students	Phase I				Phase II				Phase III				Total		
		Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours/ Unit	Cost/ Unit	Cost	Units	Hours	Cost
(add additional cells as needed)																
Total	0	0			\$0.00	0			\$0.00	0			\$0.00	0	0	\$0.00

3. Total Training Costs

		Phase I		Phase II		Phase III		Total	
			Cost		Cost		Cost		Cost
Total			\$0.00		\$0.00		\$0.00		\$0.00

* Phases are provided for illustration purposes only. The costs submitted must match the phases in your implementation plan.

****Add additional phases as necessary**

Please check all formulas

**Appendix C
Price Proposal**

Schedule 5: Travel & Other Costs
Travel and Other Costs

Vendor Name:

Phase Category	Phase I Cost	Phase II Cost	Phase III Cost	Total Cost
Total	\$0.00	\$0.00	\$0.00	\$0.00

*Please Label each Phase consistent with your implementation methodology

**Add additional lines /phases as necessary

Please check all cell formulas

**Appendix C
Price Proposal**

Schedule 6: Hosting Fees

Vendor Name:

Detailed Hosting Fees

Service Elements	Annual Proposed Cost	Fee Per Month	Assumptions / Notes (if necessary)
Infrastructure & Operations Support	-		
Equipment	-		
Telecommunications and Network Support	-		
Client Environment Support	-		
Disaster Recovery	-		
Other	-		
Services/Fees Subtotal	\$0.00		
Less Discount			
Total License Fees	\$0.00		

*** NOTE: All vendors submitting pricing for hosting options must identify the hosting party, terms and conditions, and a description of all services being proposed as an attachment to the RFP response.**

Appendix D – Vendor Exceptions to the RFP

DOT.Comm RFP for Douglas County Land Records Management System

It is DOT.Comm's intent to contract with a private Vendor. All Vendor representations, whether verbal or written, will be relied on by DOT.Comm and the Douglas County offices of the Register of Deed's, the County Clerk/Comptroller, the County Assessor, and County Treasurer in its evaluation of the responses to this Request for Proposal. DOT.Comm's reliance on the Vendor's represented expertise is to be considered as incorporated into any, and all, formal Agreements between the parties.

PRINT THE WORDS "NO EXCEPTIONS" HERE _____
IF THERE ARE NO EXCEPTIONS TAKEN TO ANY OF THE TERMS, CONDITIONS, OR SPECIFICATIONS OF THESE REQUEST FOR PROPOSAL DOCUMENTS.

IF THERE ARE EXCEPTIONS TAKEN TO ANY OF THESE TERMS, CONDITIONS, OR SPECIFICATIONS OF THESE REQUEST FOR PROPOSAL DOCUMENTS, THEY MUST BE CLEARLY STATED ON THE "EXCEPTIONS TO DOT.COMM'S RFP FOR DOUGLAS COUNTY LAND RECORDS MANAGEMENT SYSTEM RFP" TABLE BELOW AND RETURNED WITH YOUR PROPOSAL.

IF YOU PROVIDED A SAMPLE COPY OF YOUR CONTRACT YOU STILL NEED TO IDENTIFY IN THIS DOCUMENT ("VENDOR EXCEPTIONS TO THE RFP") ANY AND ALL EXCEPTIONS YOU HAVE TO THE TERMS AND CONDITIONS.

Firm or Individual	
Title	
Telephone	
Email	
Address	

PRINT NAME AND TITLE

AUTHORIZED SIGNATURE

DATE _____

OTHER NOTES:

Appendix D – Vendor Exceptions to the RFP

DOT.Comm RFP for Douglas County Land Records Management System

Add any additional line items for exceptions as necessary and reference any explanatory attachments within the line item to which it refers.

	RFP Section #, Page #	Exception <i>Describe the nature of the Exception</i>	Explanation of Why This is an Issue for You	Your Proposed Alternative to Meet DOT.Comm's Needs
1				
2				
3				
4				
5				

APPENDIX E Vendor References

Submit the minimum number of references as required in the RFP. References provided must be for similar goods/services as requested in the RFP.

1. Name of Firm:			
Address:			
Contact Name and Title:	Name:	Title:	
Contact Data:	Ph:	Fax:	E-Mail:
Estimated Number of Named Users:			
Software Modules Implemented:			
Services Provided by Supplier:			
Start and Completion Dates:			

2. Name of Firm:			
Address:			
Contact Name and Title:	Name:	Title:	
Contact Data:	Ph:	Fax:	E-Mail:
Estimated Number of Named Users:			
Software Modules Implemented:			
Services Provided by Supplier:			
Start and Completion Dates:			

3. Name of Firm:			
Address:			
Contact Name and Title:	Name:	Title:	
Contact Data:	Ph:	Fax:	E-Mail:
Estimated Number of Named Users:			
Software Modules Implemented:			
Services Provided by Supplier:			
Start and Completion Dates:			

*****NOTE*****

IF THIRD PARTY PROVIDERS ARE ALSO PROPOSED, SUBMIT REQUIRED REFERENCE INFORMATION AS AN ATTACHMENT.