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# Request for Proposal

Issued by

Cumberland County  
Registry of Deeds

Records Management Workflow and Imaging System  
For the Cumberland County Registry of Deeds

Cumberland County Courthouse  
142 Federal Street  
Portland, Maine 04101  
Telephone: 207.871.8399 Fax: 207.772.4162



Sealed proposals will be received at the Cumberland County Register of Deeds Office,  
Cumberland County Courthouse, Portland, Maine 04101 until

September 15, 2009 at 10:00 a.m.

## **LEGAL NOTICE**

### **Request for Proposals**

The Cumberland County Registry of Deeds is currently accepting proposals for the following goods or services:

#### **Records Management Workflow and Imaging System For the Cumberland County Registry of Deeds**

Sealed proposals will be accepted until:

**September 15, 2009 at 10:00 a.m.**

At the following location:

Cumberland County Register of Deeds  
Cumberland County Courthouse  
142 Federal Street  
Portland, Maine 04101

A pre-bid conference will be held on September 1, 2009 at 9:00 a.m. in the Peter Feeney Conference Room, at the address listed above. This conference is not mandatory but all interested vendors are encouraged to attend.

Questions regarding the RFP will be received until August 18, 2009 and should be directed to Pamela Lovley, Cumberland County Register of Deeds by e-mail at [lovley@cumberlandcounty.org](mailto:lovley@cumberlandcounty.org). All e-mails will be confirmed upon receipt.

Cumberland County reserves the right to reject any or all proposals and to accept the bid deemed to be in the best interests of the County.

**GENERAL INFORMATION**

The County of Cumberland is currently accepting proposals from qualified vendors for software and implementation services for the Registry of Deeds system.

The County of Cumberland’s Signature Sheet form must accompany all bids.

Cumberland County requires written assurance from a vendor that it is an Equal Opportunity Employer. Appropriate supporting documentation of the vendor’s policies in this regard must be provided and will be retained on file by the County.

The County also reserves the right to terminate any agreement made if any one of the requirements mentioned in this Request for Proposal and signed contract is either not provided in the guaranteed time or service is otherwise unsatisfactory. Termination notice will be made in writing at least sixty days prior to termination date. The County hereby gives notice that any reparation may not prevent said termination.

All terms and conditions of this request for proposal are to be considered incorporated into the contract.

**PRE-BID CONFERENCE**

A pre-bid conference will be held on September 1, 2009 at 9:00 a.m. in the Peter Feeney Conference Room, first floor of the Cumberland County Courthouse, 142 Federal Street, Portland, Maine 04101. This conference is not mandatory but all interested vendors are encouraged to attend.

**BID SUBMISSION AND PROPOSAL DEADLINE**

**FINAL AWARD CRITERIA**

Recommendations for the selection of the final vendor for Cumberland County will be based upon the following criteria:

- Quality, clarity, and responsiveness of proposal in conformance with instructions, conditions, and format contained herein.
- Cost and quality of software/implementation services.
- Ability to *actually* meet functional/technology requirements of the County.
- Implementation and training plans.
- Demonstrated successful performance of proposed software and implementation services vendors elsewhere in the public sector.
- System maintenance, upgrades, and ongoing technical support.
- Vendor financial stability and industry reputation.

## **ADDITIONAL INFORMATION**

**Company Background.** Vendors must provide the following information about their company so that the County can evaluate their stability and the ability to support the commitments set forth in response to the RFP. The County, at its option, may require a vendor to provide additional documentation and/or clarify requested information. The vendor should outline their company's background, including:

- How long the company has been in business.
- A brief description of the company size and organization.
- If applicable, how long the company has been selling the software proposed to public sector clients.
- The number of public sector installations and size of each (number of users)
- Most recent audited financial statements (e.g., annual sales, profitability, etc.)
- Listing of public sector installations by name and state.
- Any material (including letters of support or endorsement) indicative of the vendor's capabilities.

## **REFERENCES**

Attached is a software and implementation firm reference list form. The form requests at least five references that most closely reflect similar project to the County of Cumberland's scope of work within the past three years. These references should be sites at which the software has been fully implemented.

## **SUMMARY**

The intention of issuance of this RFP is to promote a competitive process for the evaluation of software and implementation opportunities that provide the best value to Cumberland County within their fiscal constraints.

Sealed proposals – one original and five copies – will be accepted by the Cumberland County Register of Deeds, Cumberland County Courthouse, 142 Federal Street, Portland, Maine 04101, until **10:00 a.m. on September 15, 2009 and will be opened later that day.**

**Sealed bids must be addressed to: Cumberland County Registry of Deeds Sealed Bid, 142 Federal Street, Portland, Maine 04101.**

Proposals received after the stated date and time will not be considered and will be returned to the vendor unopened. Faxed or emailed proposals are not acceptable. It shall be the vendor's responsibility to ensure that proposals are received on time when sent by delivery service or courier.

The contract will be awarded at the Cumberland County Commissioner's Meeting on October 13, 2009. This date is subject to change based on any unforeseen changes to the Commissioner's meeting schedule.

Award of the contract, if any, will be to the firm deemed best qualified, in accordance with the selection criteria, to provide the services to the County. Pricing, while an important factor, will be only one criterion used to evaluate the responses to the RFP.

## **QUESTIONS**

All questions regarding this RFP should be directed in writing to: Pamela E. Lovley, Register of Deeds, by e-mail at [lovley@cumberlandcounty.org](mailto:lovley@cumberlandcounty.org). All e-mail will be confirmed upon receipt. All inquiries must be received no later than August 18, 2009.

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## **TERM OF CONTRACT**

The term of the contract shall be for five years with the option of 2 three year extensions possible based on the County's satisfaction with costs and services provided.

## **TECHNICAL REQUIREMENTS**

All indexes, microfilm, document/plan images and/or magnetic tape, etc., shall remain the sole and exclusive property of the County. All images shall be stored in a non-proprietary format such as Windows based recording, imaging and indexing platform. Any and all revenues produced by viewing and/or copying any of the County records shall remain the revenue of the County.

Vendor shall be responsible, at its own expense, for the conversion of existing data, if necessary, so that the system shall "go live" by January 1, 2010. Any and all licensing fees and maintenance costs necessary for the continued operation of all equipment currently owned by the County and all equipment that the Vendor proposes to add must be included in the proposal.

Vendor shall be responsible for the installation and integration of all hardware and software included in its proposal. Vendor shall conduct training session for the Registry staff and public deemed necessary by the County prior to the beginning of the contract period and at any time during the contract period. Vendor shall provide support for both software and hardware during all hours that the Registry is open to the public. In the event of complete software failure, the County requires that the Vendor's disaster recovery plan include on site technical support within 24 hours of notification regardless of day of the week.

The County expects the system to function throughout the entire contract with speed and efficiency. Response time for search criteria entered should be not more than 3 to 5 seconds. Staff and public terminals should be able to work at capacity with multiple windows/modules open with no significant slow down of the system.

## **HARDWARE**

The Registry of Deeds currently leases PCs, printers, scanners and server. A plan scanner/copier has been purchased by the County - 6204 Xerox Wide Format Scanner/copier - the Registry has incorporated all plan images and indexes onto the system and will do so going forward. The Vendor must have the ability to fully integrate the County owned scanner/copier to the Vendors scan program for digitizing, storing, viewing and printing surveying plans. The County anticipates that it will need to lease the following equipment:

- 16 staff workstations with 20" flat screen monitors, keyboard and mouse
- 14 public search stations with 20" flat screen monitors, keyboard and mouse
- 1 main server with back up server (installed 2005), battery backup power supply, monitor, keyboard and mouse. Currently, the server has a disk capacity of 19.6 GB. To date, we have used 17.0 GB.
- 2 scanners with simplex and duplex document capability. Capable of scanning 8 ½ x 11 and 11x14 size documents with sheet feed and flatbed.
- 1 Server Printer
- 3 Laser Jet copiers
- 13 Receipt printers

Vendor should configure its system so that the needs of the Registry will be met for the duration of the contract period. A refresh of the equipment is expected every 3 years.

## **SOFTWARE**

The Vendor's software program must include the following features:  
Software must provide different levels of coded access: Public search, Employee operation and Supervisor.

Account control features that automatically figure recording fees, surcharge, extra names, marginal reference fees and transfer tax in accordance with Maine statutes. Vendor will upgrade the software at its own expense within 90 days of any statute changes. In cases of Emergency Legislation, which changes in the statute take effect immediately, the Vendor is expected to update changes immediately.

Internal audit controls required by Maine Revenue Services to insure no changes can be made to funds undetected.

System shall automatically assign Volume and Page (s), instrument number, date and time of recording and printing this information on the recorded document. System shall also automatically figure recording fees for plans and automatically assign the plan book and page number. System must support multiple recording stations, indexing stations, scan stations and public view stations.

System shall provide accurate accounting reports such as daily, weekly, monthly counter control reports; transfer tax summary report satisfactory to Maine Revenue Service; charge account billing statements; and copy account billing statements.

Index reports showing grantor, grantee, type of document, location by town, date of document, date of recording and book and page in compliance with Maine statutes. Indexes shall be sorted by both grantor/grantee or to/from. Vendor shall provide daily, monthly and yearly merges.

Index report for plans shall show owners, streets, plan title, date of plan, date of recording, location by town and plan book and page number. Plan index reports shall be sorted by town. Vendor shall provide daily, monthly and yearly merges.

Software must support imaging documents and integrating the image into other software features such as public search. System must allow image rescans by both individual page and by document as a whole. Monthly town transfers to be downloaded to a CD for each of the 28 municipalities and automatically charge the appropriate municipality account. System must support customization of the assessor's copies by town and documents type.

Public view stations shall have ability to show all indexed information for recorded documents and plans, link to the image of the document for viewing, show changes made to the indexing of the document and allow for printing or faxing of the document with automatic billing to the customer account.

Marginal references must be indexed and be cross-referenced to the original document in accordance with Maine Statutes.

Indexing features shall include copying information from one document to another (from either the preceding document, if desired, or from some other document choice, if desired); frequently used grantor/grantee names copied by alphabetic code; spell check of indexed names; automatic indexing from marginal references and support multiple index groups for a single document.

Land Records in Cumberland County go back to 1760. Software should allow for access to all images and indexing for input, corrections and printing with no additional expense to the County.

Scheduled backup during off hours.

The system must support internet service to the public with viewing and printing of indexes and document/plan images. The Vendor must support the use of credit cards for method of fee collection. The Vendor will be required to provide technical support and maintenance for the web site.

The Vendor must have the ability to fully integrate the County owned Xerox wide format digital scanner/copier to the Vendors scan program for digitizing, storing, viewing and printing plans.

The Vendor's software must support the ability to receive and record electronic documents. Please specify if the County will be required to purchase additional software to allow for electronic recording when it is needed. Please provide anticipated cost and be prepared to demonstrate the electronic recording process.

### **RELATED SERVICES**

All documents must be microfilmed in compliance with Maine Statutes. System must provide for images to be burned to a CD for conversion from CD to 35 mm microfilm.

On average, the Registry records approximately 100,000 documents per year and approximately 700 plans. The Registry no longer prints books. All land record books are online. System must support multiple view stations to accommodate public access to the imaged documents.

System should be capable of providing electronic recording, redaction capabilities, disaster recovery services, interfacing with GIS, municipal tax assessors.

## **COST ANALYSIS**

In addition to any other information submitted by the Vendor, please include the following information:

- Existing hardware that will be used for the vendor's proposal
- New hardware that will be supplied and cost
- Software licensing costs
- Hardware, old and new, maintenance costs
- Software support cost
- Hardware support cost
- Internet support cost
- Microfilm conversion from CD
- If vendor does not currently have a system that provides all of the criteria required in this request for proposal – please indicate which items are not currently available and the cost of providing these items.
- Please indicate any additional software features or hardware items that vendor feels would benefit Cumberland County.
- Cost of future technology such as electronic filing, interfacing with GIS, municipalities.
- Total cost to Cumberland County of vendor's proposal for term of contract broken down by the 5 year contract. Indicate to whom these costs would be payable.



## County of Cumberland Signature Sheet

EXECUTION OF THIS FORM CERTIFIES UNDERSTANDING AND COMPLIANCE WITH THE  
TOTAL RFP PACKAGE.

Please print or type:

This Proposal Submitted By:

Company Name: \_\_\_\_\_

Authorized Agent Name & Title \_\_\_\_\_

Contact Person: \_\_\_\_\_

Company Address: \_\_\_\_\_

City, State Zip Code \_\_\_\_\_

Daytime Telephone \_\_\_\_\_

Fax Number \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Include a statement that the firm is an Equal Opportunity Employer and has harassment  
and drug free workplace policies in place.

\_\_\_\_\_  
Signature of Authorized Agent

\_\_\_\_\_  
Date



## County of Cumberland

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### Software and Implementation Services

#### Software/Implementation Firm Reference List

The following is a list of at least five (5) references that most closely reflect similar consulting projects to the County of Cumberland's scope of work within the past three (3) years. These references should be sites at which the software has been *fully implemented*. Please use the following format in submitting references.

Name of Firm, City, County or Agency \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Contact: \_\_\_\_\_/Title: \_\_\_\_\_

Service Dates: \_\_\_\_\_

Software Program/Version: \_\_\_\_\_

Summary of Project:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Project Cost: \$ \_\_\_\_\_ Operating Budget: \$ \_\_\_\_\_

Project Manager: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Product (Modules- scanning, maintenance, inquiry, reporting) \_\_\_\_\_

\_\_\_\_\_