



2802 S. Bus. Hwy 281  
Edinburg, Texas 78539  
Phone: (956) 318-2626  
Fax: (956) 318-2629  
www.co.hidalgo.tx.us/purchasing

## MEMORANDUM

(APPROVAL OF SPECIFICATIONS)

**To:** Arturo Guajardo Jr.  
Attn: Noe Lopez

**From:** Elena Gomez Contract Specialist II  
Hidalgo County Purchasing Department.

**Date:** July 11, 2019

**Re:** Approval or Disapproval of Specifications for: RFP NO.: 2019-187-MEG Hidalgo County Clerks- "Records, Management and Document Imaging Process"

Please review the following **SPECIFICATIONS** and verify if all requirements are met by signing below and indicating **APPROVE** (or) **DISAPPROVE**. If specifications are **NOT** met, make any and all modifications necessary and return the revised copy to the designated Buyer in the Purchasing Department. If you have any questions, please call me at (956) 318-2626 ext. # 4855.

APPROVE <input checked="" type="checkbox"/>	DISAPPROVE <input type="checkbox"/>
APPROVED WITH MODIFICATIONS <input type="checkbox"/>	

FUNDS AVAILABILITY:  YES /  NO /  Other

(Specify) \_\_\_\_\_

**BUDGET ACCOUNT NO:** 9-1237-415-40-180-003-0-540

	Noe Lopez Jr.	Co. Clerk	7/11/19
AUTHORIZED SIGNATURE	PRINTED NAME	DEPARTMENT	DATE

**SUBMIT THIS FORM TO THE HIDALGO COUNTY PURCHASING DEPARTMENT, VIA FAX TO 956-292-7612 or e-mail: [elena.gomez@co.hidalgo.tx.us](mailto:elena.gomez@co.hidalgo.tx.us) by no later than July 3 2019 @ 4:00 P.M.**

Enclosures



3+ Sealed proposals w/qualifications will be received for Hidalgo County **“Records Management and Document Imaging Process”**, in accordance with the requirements attached hereto as Exhibit "A." Proposals should address all requirements set forth. Proposers may suggest substitutions of features which they feel would be in the best interest of Hidalgo County ("County"). Strong rationale must be presented for any deviation from the requirements. Hidalgo County reserves the right to reject the deviation and its effect on the overall proposal.

4+ One (1) original, qpg (3) copies, and three (3) USB's/CD's in pdf format of all RFPs are required, with the vendor's name and address clearly typed/printed on upper left-hand corner and the proper notation clearly typed/printed on the lower left-hand corner of the envelope and/or package, RFP No.: 2019-187-00-00-MEG Hidalgo County Clerk **“Records Management & Document Imaging Process”** and in County's Purchasing Department, physical address: 2802 S. Business Hwy. 281; mailing address: 2812 S. Hwy. Business 281, Edinburg, Texas, on or before 9:30 a.m., Wednesday, \_\_\_\_\_, 2019.

NO FACSIMILES, EMAILS OR LATE ARRIVALS WILL BE ACCEPTED. ANY RFP RECEIVED AFTER THAT TIME WILL NOT BE OPENED AND WILL BE RETURNED. OVERNIGHT MAIL MUST ALSO BE PROPERLY LABELED ON THE OUTSIDE OF EXPRESS ENVELOPE OR PACKAGE WITH REFERENCE TO RFP No.: 2019-187-00-00-MEG Hidalgo County Clerks **“Records Management & Document Imaging Process”**.

WRITTEN QUESTIONS WILL BE ACCEPTED WILL BE ACCEPTED via facsimile to (956) 292-7612 or via e-mail to: [elena.gomez@co.hidalgo.tx.us](mailto:elena.gomez@co.hidalgo.tx.us) BY NO LATER THAN Wednesday, \_\_\_\_\_ 2019 at 5:00 p.m. Responses will be sent to all applicants by Friday, \_\_\_\_\_ 2019. TELEPHONE INQUIRES WILL NOT BE ACCEPTED.

Hidalgo County reserves the right to refuse and reject any/all proposals and to waive any/all formalities or technicalities or to accept the proposal considered the best and most advantageous to Hidalgo County.

Additionally, all forms listed below must be properly executed and included with your RFP:

1. Legal Notice (See page 9);
2. Insurance pages with Acknowledgment Forms (See Exhibit “C”);
3. Form CIQ-Conflict of Interest Questionnaire (See Exhibit “D”);
4. Vendor Bidder Application & W-9 forms (See Exhibit “E”);
5. Certification Regarding Debarment (See Exhibit “F”);
6. (If applicable) – Required Contract Clauses for Contracts Under Federal Award-2CFR 20, Appendix II & FEMA (See Hxhibit “H”);
7. Proposer’s Affidavit (See Exhibit “J”); and
8. SAMS.gov Registration Acknowledgement (See Number 18 below).

3) Hidalgo County reserves the right to A. separate and accept, or eliminate any item(s) listed under this proposal that it deems necessary to accommodate budgetary and/or operational requirements; B. reject any or all proposals submitted and further reserves the right to design the evaluation criteria to be used in selecting the lowest and best proposal for approval. Receipt of any proposal shall under no circumstances obligate County to accept the lowest dollar proposal and; C. Award of this contract shall be made to the responsible offeror whose proposal is determined to be the best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other evaluation factors as herein set forth.

4) Failure of the delivered item(s) to perform as specified or failure to meet the stated delivery schedule shall release Hidalgo County from all obligations to the contracting party with regard to the item(s) in question. In

such event, County may elect to award the contract to the next-lowest responsible proposer or to reject all proposals and re-advertise.

- 5) For work to be performed at a County owned or operated location, each proposer shall, in its sole discretion, visit the job site before preparing the proposal and thoroughly familiarize himself/herself with existing conditions. Proposer should take field dimensions and note all circumstances which affect the dollar amount of the proposal.
- 6) Descriptive specifications are referenced in this document to indicate the general kind and quality of equipment desired by Hidalgo County. Due to various styles and models of equipment, proposers are required to include illustrations, specifications, explanation of warranties, and service data with their proposal including catalogue numbers and any necessary references.
- 7) Proposed prices are to remain firm for a minimum of ninety (90) days after priced proposal opening.
- 8) County reserves the right to accept or reject any or all proposals.
- 9) Any interpretations, amendments, corrections or changes to this proposal document must be in a written addendum and signed by the County Judge or his designee. Addenda will be mailed to all who are known to have received a copy of the Request for Proposals. Proposers shall acknowledge receipt of all addenda as a part of their proposal.
- 10) Costs are to be net F.O.B., County Prepaid.
- 11) County is exempt from Federal Excise Tax, State Tax, and Local Tax. Do Not include tax in cost figure. If it is determined that tax was included in the cost figures it will not be included in the tabulation of any awards. Tax exemption certificates will be furnished upon request.
- 12) Funds for this procurement have been provided through the County budget for this fiscal year only. County, on an annual basis, has the right to reconsider a contract during the budget process for ensuing years if financial resources of County are insufficient to meet the liabilities of said contract. The award of a proposal or contract hereunder will not be construed to create a debt of the County which is payable out of funds beyond the current fiscal year.
- 13) **DELIVERY INSTRUCTIONS:**
  - No deliveries accepted after 3:00 P.M., Monday-Friday.
  - At least seventy two (72) hours prior notice of delivery must be given to Martha L. Salazar, CPPB, Purchasing Agent before delivery will be accepted.
  - If you need additional information call the office listed below:

Hidalgo County Purchasing Department  
Martha L. Salazar, CPPB, Purchasing Agent  
(956) 318-2626

#### 14) BILLING AND PAYMENT INSTRUCTIONS

- Invoices must include:
  - a) Name and address of successful proposer
  - b) Name and address of receiving department or official

- c) Purchase Order Number and Contract Number (if any)
- d) Notation -“Hidalgo County- Third Party Administration, Individual Stop Loss for Self-Funded Medical Plan,roup Term Life and Accidental Death & Dismemberment ”
- e) Descriptive information as to the items or services delivered, including product code, item number, quantity, etc.

- Discount payments will be considered when offered.
- Contact person for Billing and Payment questions:

**Hidalgo County Auditor's Office**  
 2808 S. Business Hwy. 281  
 Edinburg, TX 78539  
 (956) 318-2511

**15) SCHEDULE OF EVENTS**

Proposal Acceptance Date Opening, 9:30 A.M. \_\_\_\_\_, 2019  
 Award of Contract: \_\_\_\_\_  
 Commence Service or Products: \_\_\_\_\_

**16) HIDALGO COUNTY HOLIDAYS:**

2019 YEAR	
<b>New Year’s Day</b>	<b>01/01/19</b>
<b>Martin Luther King Day</b>	<b>01/21/19</b>
<b>President’s Day</b>	<b>02/18/19</b>
<b>Good Friday</b>	<b>04/19/19</b>
<b>Memorial Day</b>	<b>05/27/19</b>
<b>Independence Day</b>	<b>07/04/19</b>
<b>Labor Day</b>	<b>09/02/19</b>
<b>Columbus Day</b>	<b>10/14/19</b>
<b>Veteran’s Day</b>	<b>11/11/19</b>
<b>Thanksgiving Day</b>	<b>11/28/19-11/29/19</b>
<b>Christmas Day</b>	<b>12/24/19-12/25/19</b>
<b>New Year’s Eve</b>	<b>12/31/19</b>

**17) BID OR PERFORMANCE BOND AND DEBARMENT CERTIFICATION; PAYMENT UNDER CONTRACT**

- If the contract proposed is for the construction of public works or is for a contract for goods and services exceeding \$100,000, all bidders shall furnish a good and sufficient bid bond in the amount of five percent of the total contract price. A bid bond must be executed by a surety company authorized to do business in Texas.
- Together with the signing of a contract or issuance of a purchase order following the acceptance of a proposal, and prior to commencement of the actual work, the proposer shall furnish a performance bond to the County for the full amount of the contract, if that contract exceeds \$50,000.

- If the contract is for \$50,000 or less, no money will be paid to the contractor until completion and acceptance of the work or the fulfillment of the purchase obligation to the County, and, if applicable, the receipt by County of satisfactory evidence that all subcontractors and material men have been paid.
- If a contract is for the construction, alteration or repair of public buildings or public works, the contractor *shall* provide a payment bond for a contract in excess of Twenty Five Thousand Dollars (\$25,000.00), as required by Tex. Govt. Code Ch. 2253.
- For requirements contracts, bond requirements are determined by applying the proposed unit price to the estimated quantities included in the specifications.
- **All respondents are also required to furnish a certification or acknowledgment stating that the contractor or vendor is free from suspension or debarment pursuant to federal regulation 45CRF76. Register at SAMs System for Award Managemnt @ [www.sam.gov](http://www.sam.gov)**

## 18. TITLE VI NOTICE/ NONDISCRIMINATION

- a) By submitting a bid, the bidder certifies that it will comply with the following nondiscrimination statutes and their implementing regulations. Title VI of the Civil Rights Act of 1964, as amended (78 Stat.252, 42 U.S.C. §§2000d to 2000d-4) provides that no person in the United States shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Recipient receives Federal financial assistance. Title VI has been broadened by related statutes, regulations and executive orders as found in Appendices “A” through “E” as delineated in the USDOT Standard Title VI/Non-Discrimination Assurances-Specific Assurances to prohibit discrimination on other grounds including, but not limited to, religion, sex, age, and disability. (Title VI-Appendices “A” through “E”) are hereby attached as **Exhibit “G”**. The County’s entire Title VI policy may be found at <https://www.hidalgocounty.us/2071/Title-VINondiscrimination-Plan> and is hereby incorporated by reference.
- b) The following required statement and the applicable provisions of the Title VI Appendices “A” through “E” expanding these protections to the categories described herein are hereby incorporated by reference as applicable.
  - “The County of Hidalgo, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat.252, 42 U.S.C. §§2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award”.
- c) The bidder will attach all applicable notices, including those referenced in Title VI – Appendices “A” through “E”, to which it is obligated to provide or submit as part of the bid.
  - If applicable, Form FHWA 1273 – “*Required Contract Provisions Federal-Aid Construction Contracts*”, must be physically attached to certain Federal-aid construction contracts. A contractor (or subcontractor) is required to insert Form FHWA 1273 in each subcontract and all lower tier subcontracts. Form FHWA 1273 is attached as **Exhibit “I”**, and, if applicable, its provisions are incorporated in and made part of the contract entered into between the County and the successful respondent related to the present procurement.

19) **ETHICAL STANDARDS**

- It shall be a breach of ethics to offer, give or agree to give any elected official, department head or employee, or former elected official, department head or employee, of the County, or for any elected official, department head or employee or former elected official, department head or employee of the County, to solicit, demand, accept or agree to accept from another person, entity or organization, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore pending before any department or agency of the County.
- It shall be a breach of ethics for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor for any contract for the County, or any person associated therewith, as an inducement for the award of a subcontract or order.
- No public official shall have an interest in a contract awarded hereunder except in accordance with Tex. Loc. Govt. Code Chapter 171.
- **NOTICE:**  
*ALL COMMUNICATIONS BY A VENDOR TO THE COUNTY, ITS OFFICIALS, AND DEPARTMENT HEADS REGARDING THIS PROCUREMENT SHALL BE DONE THROUGH THE HIDALGO COUNTY PURCHASING DEPARTMENT.*

No vendor, its representative, agent, or employee shall engage in private communication with a member of the Hidalgo County Commissioners Court or county department heads regarding any procurement of goods or services by the County from the date that the bid, RFP, or RFQ is released. No private communication regarding the purchase shall be permitted until the procurement process is complete and a purchase order is granted or a contract is entered into. Members of the commissioner's court are required to make a reasonable effort to inform themselves regarding potential procurements and have a duty to inquire of vendors, their representatives or employees, the nature of any private communication being sought prior to engaging in any communication. "Private Communication" means communication with any vendor outside of a posted meeting of the governing body, a regular meeting of a standing or appointed committee, or negotiation with a vendor which has been specifically authorized by the governing body.

20) **DISCLOSURE OF CONFLICT OF INTEREST**

- Effective January 1, 2016, Chapter 176 of the Texas Local Government Code requires that any vendor, person, consultant or contractor considering doing business with Hidalgo County ("the County") to disclose in the Conflict of Interest Questionnaire (the "CIQ") attached as Exhibit "D", the vendor, person consultant or contractor's affiliation or business relationship that might cause a conflict of interest with the County. By law, the CIQ must be filed with the Hidalgo County Clerk's Office no later than the seventh business day after the date the person becomes aware of facts that require that statement to be filed. The disclosure requirement applies to a person or business who contract or seeks to contract with Hidalgo County for the sale or purchase of property, goods or service. Any purchase order or contract resulting from this process shall be considered null and void if the successful Proposer fails to comply with Texas Local Government Code Chapter 176. Vendors, consultants, contractors and others who desire to conduct business with Hidalgo County are encouraged to refer to Texas Local Government Code Chapter 176 for the details of this law. An offense under Texas Local Government Code Chapter 176 is a Class C Misdemeanor.

If applicable Complete Form CIQ must be submitted to the Hidalgo County Clerk's Office located at 100 North

Closner, Edinburg, Texas 78539-Hidalgo County Courthouse.

**COMPLETION AND SUBMISSION OF FORM CIQ IS THE SOLE RESPONSIBILITY OF THE PROSPECTIVE PROPOSER. QUESTIONS REGARDING COMPLIANCE SHOULD BE DIRECTED TO YOUR LEGAL COUNSEL.**

**21) CERTIFICATE OF INTERESTED PARTIES (FORM HB1295)**

- As of January 1, 2016, to comply with Texas Government Code Section §2252.908, and the rules issued by the Texas Ethics Commission found in Title 1, Section 46.1, 46.3 and 46.5 of the Texas Administrative Code, we have updated and revised our RFP packet. In accordance with these requirements, a business must submit a completed Certificate of Interested Parties Form 1295 to the County before the County may enter into a contract with the business entity. In box 3 of Form 1295, you will provide the RFP Project No. **(2019-187)**, as shown on the packet. Once completed and filed with the Texas Ethics Commission, Form 1295 must be printed, filled out, signed and submitted to our office via email to [elena.gomez@co.hidalgo.tx.us](mailto:elena.gomez@co.hidalgo.tx.us). Hidalgo County cannot enter into a contract until Form 1295 is submitted, therefore, failure to timely submit a completed Form 1295 may result in the delay of award. Full instructions for completion and submittal of Form 1295 may be found on the Texas Ethics Commission website:

[https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

THE AWARDED VENDOR WILL HAVE THIRTY (30) DAYS FROM THE DATE THE HIDALGO COUNTY COMMISSIONER'S COURT APPROVES THIS AGREEMENT, TO SUBMIT THE SIGNED FORM 1295. HIDALGO COUNTY CANNOT ENTER INTO A CONTRACT UNTIL FORM 1295 IS SUBMITTED.

- 22) If during the life of any contract or proposal awarded, the successful proposer's net prices generally available to other customers for items awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to County.
- 23) Proposals and all goods and services provided thereunder shall comply with all federal, state and local laws concerning this type(s) of goods and/or services.
- 24) Minimum Standards for Responsible Prospective Proposers: A prospective proposer must affirmatively demonstrate proposer's responsibility. A prospective proposer, by submitting a proposal, represents to County that it meets the following requirements:
- Possess or is able to obtain adequate financial resources as required to perform under the proposal;
  - Be able to comply with the required or proposed delivery schedule;
  - Have a satisfactory record of performance;
  - Have a satisfactory record of integrity and ethics;
  - Be otherwise qualified and eligible to receive an award.
- 25) Successful proposer will pay or cause to be paid, without cost or expenses to County, all FICA, FUTA/SUTA and Federal Income Withholding Taxes of all employees, and all wages and benefits as required by Federal or State law. Successful proposers' officers, agents and/or employees will not be entitled to any benefits of an employee or elected official of County, including, but not limited to, benefits associated with County's civil service system.

- 26) Any contract award to a successful proposer will be in effect until (a) the contract expires, (b) delivery and acceptance of products, and/or performance of services ordered, or (c) terminated by County with thirty (30) day's written notice prior to cancellation.
- 27) County reserves the right to enforce performance of any contract awarded hereunder in any manner prescribed by law or deemed to be in the best interest of the County. In the event of breach or default by successful proposer; County reserves the right to terminate any contract immediately in the event a successful proposer fails to:
- A. Meet schedules;
  - B. Pay any required fees or taxes; or
  - C. Otherwise, perform in accordance with the requirements.
- 28) **Successful proposer shall defend, indemnify and save harmless County and all its elected officials, officers, agents and employees from all suits, actions, or other claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the successful proposer, or of any agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from proposal award. Successful proposer indemnifies and will indemnify and save harmless County from liability, claim or demand on their part, agents, servants, customers, and/or employees whether such liability, claim or demand arise from event or casualty happening or within the occupied premises themselves or happening upon or in any of the halls, elevators, entrances, stairways or approaches of or to the facilities within which the occupied premises are located. Successful proposer shall pay any judgment with costs which may be obtained against County growing out of such injury or damages, and shall, upon request, provide a defense to County by counsel reasonably acceptable to County. Successful proposer's indemnity hereunder shall include but is not limited to, claims relating to patent, copyright or trademark infringement, and the like, arising out of the goods or services provided by successful proposer.**
- 29) Successful proposer shall warrant that all items/services shall conform to the specifications and/or all warranties provided under the Uniform Commercial Code and be free from all defects in material, workmanship and the like. Items supplied under a contract pursuant to this Request for Proposals shall be subject to County's approval. Items found to be defective or not meeting specifications shall be replaced by successful proposer within two business days at no expense to County. Items not picked up within one (1) week after notification shall be deemed a donation to County and may be used or disposed of at County's discretion and without waiver of any other rights of County as to the item's nonconformity.
- 30) This document and any disputes arising hereunder shall be governed and construed according to the laws of the State of Texas and will be performable exclusively in Hidalgo County, Texas.
- 31) The successful proposer shall not assign, sell, transfer or convey its rights under any awarded contract, in whole or in part, without the prior written consent of County.
- 32) Proposers shall provide with the proposal response, a list of at least three (3) references where like services have been supplied by their firm. Include the name of the business or government, address, telephone number and name of representative or contact person.
- 33) **CONTRACTS SUBJECT TO FEDERAL AWARD:**
- The procurement standards of 2 CFR, Part 200, including, but not limited to 2 CFR 200.317-200.326, and

applicable Hidalgo County Purchasing Policy (found at <https://www.hidalgocounty.us/805/County-Administrative-Policies> ) address the County's requirements, as a non-Federal entity, in regards to contracts it enters into that are subject to federal award. Pursuant to 2 CFR 200.236, the County, as a non-Federal entity, is required to include into contracts subject to federal award, the applicable provisions and contract clauses described in Appendix II to 2 CFR 200, the provisions of Appendix II to 2 CFR 200 and the required contract clauses found in **Exhibit "H"** are incorporated by reference, whether specified explicitly or not, as part of this procurement packet and any resulting agreement.

- In addition, should the County's contracts under Federal award be subject to assistance from the Federal Emergency Management Agency (FEMA), FEMA requires the inclusion of contract terms in addition to those under Appendix II to 2 CFR 200. **If applicable**, the additional contract clauses required by FEMA are found in **Exhibit "H"** and incorporated by reference, whether specified explicitly or not, as part of this procurement packet and any resulting agreement. Should the contract be subject to assistance from FEMA, it is the County's intention to comply with FEMA requirements; therefore, any conflict in terms should be resolved as such.
- **If applicable**, in accordance with 2 CFR 200.319, Contractors that develop or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals must be excluded from competing for such procurements. (See 2 CFR 200.219). Additionally, Hidalgo County policy provides that for federal road projects, engineers, engineering firms, and/or a subsidiary, affiliate, or a consultant of the engineer or engineering firm who has received compensation from the County, that assist in the development of, or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals, will be excluded from competing for such procurements (i.e...subsequent construction engineering/management and/or inspection/testing) for all other phases of the project. (See Hidalgo County Policy: "*Procedures for Selection and Contracting of Professional Service Providers for Federal Road Projects*" found at <https://www.hidalgocounty.us/805/County-Administrative-Policies>, which, if applicable, is incorporated by reference, whether specified explicitly or not, as part of this procurement packet and any resulting agreement for all purposes).

#### 34) HISTORICALLY UNDERUTILIZED BUSINESS/DISADVANTAGED BUSINESS ENTERPRISES:

The County is committed to ensuring that Historically Underutilized Businesses (HUB) and Disadvantaged Business Enterprises (DBE) such as small business enterprises (SBE), minority and women-owned business enterprises (MWBE) receive a fair and equal opportunity for participation in the County's procurement process. The County encourages the use of these enterprises both as prime and subcontractors. (See **Exhibit "E"** for requirements).

When federal funds are expended by the County, the County will take affirmative steps set forth in 2 CFR 200.321 to assure that small, minority, women-owned businesses and labor surplus area owned firms are used when possible. Pursuant to 2 CFR 321, the County requires that a prime contractor who uses sub-contractors take affirmative steps set forth in 2 CFR 200.321, including:

- a) Placing qualified small and minority business and women's business enterprises on solicitation lists;
- b) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- c) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;
- d) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; and
- e) Using the services and assistance, as appropriate, of such organizations as the Small Business

Administration and the Minority Business Development Agency of the Department of Commerce.

Nothing in this section is to be construed to require the County to award a contract other than as required by law and Hidalgo County policies and procedures.

- 35) Respondents must provide all applicable documentation requested with this Proposal in their response. Failure to provide this information may result in rejection of the qualification as non-conforming.

DRAFT

REQUEST FOR PROPOSAL LEGAL NOTICE  
for  
HIDALGO COUNTY CLERKS  
“RECORDS MANAGEMENT AND DOCUMENT IMAGING PROCESS”  
RFP No.: 2019-187-00-00-MEG

To: Martha L. Salazar, CPPB, Purchasing Agent  
Hidalgo County Purchasing Department  
Physical Address: 2802 S. Business Hwy. 281  
Mailing/US Postal Address: 2812 S. Business Hwy. 281  
Edinburg, Texas 78539

In accordance with the Requirements, and subject to all laws and regulations of the United States and state and local laws, the undersigned proposer proposes and commits to furnish all labor, equipment, material, software, and services as set forth in the documents hereinbefore mentioned. The undersigned proposer further agrees, upon acceptance of its proposal, to execute a contract and/or Purchase Order issued by Hidalgo County for performing and completing the work described in the Requirements within the time stated and for the prices proposed in the documents attached hereto and made a part hereof.

Proposer acknowledges receipt of all of the pages of the documents referenced in the Request for Proposal Checklist presented in connection with this procurement. Proposer understands that Hidalgo County reserves the right to reject any or all proposals and further reserves the right to design the evaluation criteria to be used in selecting the lowest and best proposal.

Proposer agrees that this proposal shall be good and may not be withdrawn for a period of ninety (90) calendar days after the scheduled closing time for receiving proposals, as contained in the Requirements.

Respectfully submitted,

FIRM: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

BY: \_\_\_\_\_  
PRINT  
NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

**EXHIBIT A**

**SPECIFICATIONS, REQUIREMENTS,  
AND SCOPE OF SERVICES**

**HIDALGO COUNTY CLERK'S OFFICE**

**REQUEST FOR PROPOSAL**

**"RECORDS, MANAGEMENT AND  
DOCUMENT IMAGING PROCESS"**

**RFP NO: 2019-187-08-14-MEG**

**HIDALGO COUNTY CLERK'S OFFICE**

**REQUEST FOR PROPOSAL**  
**“RECORDS, MANAGEMENT AND DOCUMENT IMAGING**  
**PROCESS”**  
**RFP NO: 2019-187-00-00-MEG**

**Overview:**

The objective of this Request for Proposals (RFP) is to obtain proposals for a turnkey fully integrated records management and document image processing system and specific vendor provided production services (hereinafter referred to as the “System”) for the Office of the County Clerk for Hidalgo County (hereinafter referred to as the “County” or the “Clerk”)

The Hidalgo County Purchasing Department will receive sealed envelopes containing proposals for the provision of “**Records, Management and Document Imaging Process**” as specified herein. Sealed proposals will be accepted until **9:30 A.M., Wednesday, \_\_\_\_\_, 2019. ANY RFP RECEIVED AFTER THAT DATE AND TIME WILL NOT BE ACCEPTED AND WILL BE RETURNED UNOPENED.**

Deliver Submittal to:  
RFP Number: **2019-187-00-00-MEG**

<u>US Postal Mail Address:</u> Martha L. Salazar, CPPB, Purchasing Agent Hidalgo County Purchasing Department Administration Building 2812 S. Business Hwy 281 Edinburg, Texas 78539	<u>Physical Address:</u> Martha L. Salazar, CPPB, Purchasing Agent Hidalgo County Purchasing Department Administration Building 2802 S. Business Hwy. 281 Edinburg, Texas 78539
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**The Submittal Envelope Must Show The RFP Number, Name And Opening Date.**

All/Any costs and expenses associated with the preparation and submission of (bids, proposals and/or quotes) shall be the responsibility of the proposer and not reimbursements for such charges or expenses shall be passed onto Hidalgo County.

Hidalgo County has the authority to utilize State Contracts from its membership with their existing or new cooperatives when ever it is in the County’s best interest to do so.

The following outlines the Request for Proposals:

**SECTION I -GENERAL TERMS AND CONDITIONS**

**WRITTEN QUESTIONS WILL BE ACCEPTED VIA FACSIMILE NO LATER THAN Wednesday, \_\_\_\_\_, 2019, at 5:00 P.M. at (956) 318-2629. Responses will be sent to all applicants via facsimile by Friday, \_\_\_\_\_, 2019. TELEPHONE INQUIRIES WILL NOT BE ACCEPTED.**

**DISCLOSURE OF CONFLICT OF INTEREST:**

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor, person, consultant or contractor considering doing business with Hidalgo County (“the County”) to

disclose in the Conflict of Interest Questionnaire (the "CIQ") attached as **Exhibit D**, the vendor, person consultant or contractor's affiliation or business relationship that might cause a conflict of interest with the County. By law, the CIQ must be filed with the Hidalgo County Clerk's Office no later than the seventh business day after the date the person becomes aware of facts that require that statement to be filed. The disclosure requirement applies to a person or business who contract or seeks to contract with Hidalgo County for the sale or purchase of property, goods or service. Any purchase order or contract resulting from this process shall be considered null and void if the successful participant fails to comply with Texas Local Government Code Chapter 176. Vendors, consultants, contractors and others who desire to conduct business with Hidalgo County are encouraged to refer to Texas Local Government Code Chapter 176 for the details of this law. An offense under Texas Local Government Code Chapter 176 is a Class C Misdemeanor.

Please submit complete CIQ forms to the Hidalgo County Clerk's Office located at 100 No. Clossner, Edinburg, Texas 78539-Hidalgo County Courthouse **COMPLETION AND SUBMISSION OF FORM CIQ IS THE SOLE RESPONSIBILITY OF THE PROSPECTIVE BIDDER.**

**PROPOSER'S AFFIDAVIT:**

Prior Contract award, respondents to this RFP must submit a signed Proposer's Affidavit (attached herein in **Exhibit E**) certifying that the submission is (1) not the result of Collusion as described in the Proposer's Affidavit or that the Respondent has not and will not attempt to lobby directly or indirectly as described in the Proposer's Affidavit.

**NON-DISCRIMINATION:**

Submitters, during the performance of this contract, will not discriminate against any employee or applicant for employment because of race, religion, sex, national origin or disability except where religion, sex, national origin or disability is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor.

**PROCESSING TIME FOR PAYMENT:**

Submitters are advised that a minimum of thirty (30) days is required to process invoices for payment.

**ELECTRONIC TRANSMISSION OF BIDS:**

Hidalgo County's Purchasing Department will not accept telegraphic or electronically transmitted submissions.

**PROOF OF FINANCIAL AND BUSINESS CAPABILITY:**

Submitters must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these requirements. Hidalgo County will make the final determination as to the submitter's ability.

**SUBMITTER DEFAULT:**

Hidalgo County reserves the right, in case of submitter default, to procure the articles or services from other sources and hold the defaulting submitter responsible for any excess costs occasioned thereby.

**RESTRICTIVE OR AMBIGUOUS REQUIREMENTS:**

It is the responsibility of the submitter to review the Request for Proposal (RFP) packet and to notify the Purchasing Department if the requirements are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the requirements or proposers procedures must be received in the Purchasing Department not less than seventy-two hours prior to the time set for the opening. These criteria also apply to requirements that are ambiguous.

**HAND DELIVERED PROPOSALS:**

Hidalgo County requires submitters, when hand delivering proposals, to make sure that it is stamped with date and time by the County Purchasing Staff.

**SIGNING OF PROPOSALS:**

In order to be considered all submittals **must** be signed. **Please sign the original in blue ink.**

**WAIVING OF INFORMALITIES:**

Hidalgo County reserves the right to waive minor informalities or technicalities when it is in the best interest of Hidalgo County.

**SUBCONTRACTING:**

The successful submitter **may not** subcontract the award without the written consent of the Commissioners' Court of Hidalgo County.

**DURATION OF CONTRACT:** The initial term of the contract shall be for a **Four (4) Year period after date of award of contract**, with the County's option for an additional **One Year** extension based on prior year's performance evaluation and contingent upon cost remaining unchanged. Hidalgo County reserves the right to renew this contract on a month to month basis for a period not to exceed six (6) months at the end of the contract term for unforeseen delay of award for next term and contingent upon cost remaining unchanged. The system must be implemented and fully operational within **one hundred eighty (180)** calendar days from date of contract award. Additional requirements to be included in the contract, stated under **Scope of Services** in **Exhibit "A"**.

**DAVIS BACON ACT:**

All selected and awarded firms are required to include the Davis-Bacon Act when advertising and developing specifications **(if applicable)**.

**SECTION II - RFP REQUIREMENTS**

**REQUEST FOR PROPOSALS:**

The required contents and limitations for the preparation of the RFP are described in this section. Failure to provide the requested information or adhere to any County limitations will result in disqualification of the submitted RFP. A total of **one (1) original and one (1) copy and three (3) CD/USB** of the RFP shall be submitted to the address on the cover letter.

**UNDERSTANDING OF THE PROJECT:**

This section should demonstrate the proposer's understanding of the project needs, the services required, and any local issues or concerns. Briefly explain how long you have been organized and your business objectives. Explain how long you have been in business. This description should be concise, candid, and limited to 3 pages in length.

**PROPOSER'S QUALIFICATIONS:**

Hidalgo County is soliciting to contract with a proposer who is qualified, licensed and certified. The proposer will directly perform the required services and is required to have any and all applicable licenses, permits, credentials, qualifications to perform necessary services. Proposer must submit any and all applicable licenses, permits, credentials, qualifications with RFP. Photostat copies are acceptable

### **PERSONNEL AND STAFFING:**

The proposers should provide an organizational chart for the project and a summary paragraph of the project work to be performed by each proposed staff member. Biographic summaries that highlight the experience relevant to the specific project responsibilities should be provided for all proposed personnel. There is a one (1) page limitation for each biographic summary provided. Information regarding the proposer's credentials, education and experience with other entities is required and will be scored accordingly during the evaluation process.

### **REQUIRED CERTIFICATES AND SUBMITTAL:**

This section will contain *any/all* licenses, registrations, permits, and certifications as required by the STATE OF TEXAS and HIDALGO COUNTY that you possess that deem you as qualified.

If proposer/vendor cannot meet any of the following services/responsibilities, such exceptions must be noted on the company's cover letter.

## **SCOPE OF SERVICES**

The vendor must provide a system and services that consist of all hardware, operating system software, application software, and any items such as networking (i.e. replacing existing cable to meet Level & specifications) and communications needed to implement the requirements of this proposal including delivery, installation, documentation, maintenance, and user training.

If not the existing vendor, they must show previous experience in importing and converting (transition) system software platforms from the existing vendor system to the new vendor system, seamlessly.

Proposals must be divided as follows:

1. Records Management document imaging including cashiering and processing of all documents with capability of system providing for all indexing of documents to be performed in house by County Clerk Staff.
2. Proposal should include a Web Portal for the public to perform advanced property record searches.
3. Full service indexing of all real property records performed by vendor located within Texas with a guaranteed 18 hour turnaround time from date of filing. Daily indexing must match the current instrument type land records database.

The vendor must provide the following services:

1. Creation and delivery of microfilm from the digital images of scanned real property documents as an archival media.
2. Guarantee that all indexing of Real Property Records will be uploaded and available for retrieval within 24 hours.

Vendor is also to provide all accessories, labor, and materials including all consumables such as, toner cartridges and microfilm necessary for a turnkey system.

The system must provide cloud data storage for Commissioner's Court minutes which includes scanned documents and digital audio files.

The system functionality includes digital image capture (scanning); storage, retrieval, and automated cashing that include, but are not limited to the following documents types:

- Real Property Records (Official Records)
- Uniform Commercial Code Records/Financing Statements
- Birth Records
- Death Records
- Marriage Records
- Cattle Brands
- DD - 214's

The system is required to generate both the marriage license application and the marriage certificates in accordance with State of Texas and Hidalgo County Forms.

It is the responsibility of the awarded vendor to retrieve and convert "all" existing images and data from the current vendor at no additional cost to Hidalgo County.

The vendor must provide a website with customer log in capability. This site will include public access to the clerk's official records and have the capability of monitoring statistical data such as, number of hits to the site/page and number of hits to particular areas such as deeds of trust, DBA's, oil and gas leases, commissioners court minutes, and any other County Clerk records. Selected clerk personnel must have access to the site in order to retrieve this information.

The vendor is responsible for converting all existing document images within a 180-day period upon award of this contract.

The vendor must provide services that require website users to authenticate security verification for every 10 documents downloaded. The system must not allow bulk extraction of data from the website. Also, create a permanent "Unofficial Copy" watermark on all downloaded documents.

The website must allow for the option to post and manage Public Notices on the Web.

The County is not interested in the purchase of any hardware or software, at this time, therefore pricing for the system and services should be quoted on the monthly fee.

The vendor must perform all work – no subcontractors are allowed. Vendors must provide evidence of their in-house capability.

The vendor shall safeguard all information and data provided by the County. Proprietary ownership of all data, regardless of what media it is stored on, is retained by Hidalgo County. Any reproduction or duplication of any county records must have the written approval of the Hidalgo County Clerk.

The vendor must provide an audited financial statement.

The vendor must furnish Hidalgo County with at least (5) references where proposed software is processing public records, including County name, contact name, telephone number, and length of time software has been installed.

Vendors that are not currently providing services to the Clerk's Office must provide references of prior successful conversions from our existing system to theirs.

## **SYSTEM REQUIREMENTS**

### **General Specifications**

The system must be capable of handling up to 600 Official Record filings a day at start-up and allow modular expansion of the system to handle any increase in filings. System must handle various sizes, colors, and weights of paper. Images must be taken from the original documents.

The system must provide the ability to enlarge fonts in system application for all data fields and save settings by user.

The system must have the ability to record multiple documents with multiple payments in a single transaction.

The system must be able to perform all of the recording functions while the person filing the document waits for its return.

All equipment, software, and procedures must meet or surpass, on a continuing basis, all Texas State Library laws and standards for archiving and preservation of records as they are developed and become effective.

All proprietary equipment and software must be disclosed. All proprietary software, including original coding, must be placed in escrow as specified by and under the control of the Hidalgo County Clerk. The escrow information must be maintained to current status.

The system must be simple to use for the public with little to no assistance from a County employee. No sign-on should be necessary at a public terminal. Public workstations must be view or print only and provide sufficient security to preclude any possibility of altering documents.

The system must have user interface software allowing the novice operator to accomplish tasks using simple sequence, allowing quick access with a minimum of confusion, delay, or instruction. Workstations should log-off after 5 minutes of inactivity.

The system must provide an audit trail of all activity, which can be produced on a daily basis.

The system shall support optical character recognition. The system shall have the capability to extract information and pass extracted information on-line with the image-to-index originator to complete the index.

The systems information must be compatible with HTML/XML format to allow future Internet compatibility.

The systems software and hardware must be able to handle Credit Card transactions for all services offered by the Hidalgo County Clerk.

The system must allow clerks to extract indexes and images in order to write to CD only i.e.; deeds, foreclosures, assumed names.

To avoid introducing potential viruses to the system from external devices, all USB ports must be disabled.

The system should be able to perform document validation, transaction audits and detailed accounting reports by category i.e.; birth certificates long form, death certificates, marriage, informal marriage, etc.

The system must provide management tools for monitoring employee productivity and accountability.

The system must have the ability to produce reports by specific or custom scheduling and must have the ability to automatically email scheduled reports.

The system must have the ability to auto populate information from applications that have been entered online.

The system must have the ability to auto populate customer information into the cashier system via card reader.

The system must have the ability to capture an electronic signature for all applications.

The system must have the ability to manipulate images (crop, resize, cut, paste) throughout the system.

The system must have the ability to create or modify fields within a module as needed.

The system provides the ability for the administrator to customize field descriptions/field labels.

The system provides the ability for the administrator to customize workflow.

The system provides the ability to place an electronic “Certified Copy” stamp to copies that are printed. The stamp can be placed on multiple documents or any location on the document.

The system must allow for internal indexing as required by the Hidalgo County Clerk’s Office.

The system must have the ability to redact information as needed.

The system must be able to connect to DSHS for electronic submissions of vital records (TexEver).

The system must be able to create a multitude of custom financial and auditing reports detailing all system transactions.

### **Workflow Specifications**

Once logged in, users can move between modules/applications without logging in and out.

Once a document has been accepted for filing, the recording process will begin with the cashiering process at a cashiering workstation.

Enter the type of document being recorded and verified by a type table. If the type is not on the table, use “unknown” in the document type and allow the operator to update to the correct type.

Users will enter the number of pages in each document.

The system will utilize a cashiering fee table to calculate and display the total fee for each document and batch. The cashier should be able to change the fee amounts if necessary.

The system must be able to process any changes in recordings, such as recalculating the filing fee.

After the fee is received and noted on the system, the system will perform the following functions:

The system must automatically assign appropriate instrument numbers sequentially within each customer batch, processing each batch in time-received order. Instrument number assigned varies with type of document being processed, real property record, financing statement, etc.

The system must assign current recording date-year month (yyyy mm dd) and time-hour, minute and seconds am/ pm (hh:mm:ss) for each document.

The system will assign a receipt number, a transaction validation number, and a cashier identification number and generate a receipt, which also identifies all document types and monies collected.

Included on the receipt

- Received From:-Name and Address
- List of fees by document number and type
- Method of payment (include check number or numbers if multiple checks)
- Any change required
- Receipt number
- Validation number (sequential transaction number)
- Cashier identification and station number
- Total fee amount
- Date and Time
- County Seal

The system will imprint the first page of the document with the cashiering validation information and recording information. System will imprint the original instrument with the following information on the first page:

- Date and Time
- Fee Amount
- Cashiering validation information
- Instrument number

The system must allow the ability to change the locations of the stamps as necessary.

The system must have the ability to email the receipt or certified copy of the recorded document to the customer.

The system must have the capability of printing mailing labels or for returning processed documents by mail to the customer. These labels should include a mailing date and instrument identifier in addition to the pertinent name and address information.

The system must document all transactions recorded and amount charged.

The system must include tables to limit the amount of data entry required, including, but not limited to, type of document, amount charged, and name and address tables.

The system must allow payments to be accepted by cash, check, credit card or escrow. The system must calculate change due on screen and allow an option to log a refund, rather than return the cash amount. For filing and for copy charges, the system must generate invoices, if needed.

The system must issue monthly balance statements.

The system must provide individual scanners for the recording department to ensure documents are immediately scanned once they are recorded.

The system must include a cash drawer for each cashiering station. Provision must be made for closing each drawer both during the day with subtotals and at the end of each day with subtotals. Each station will be uniquely identified. The end of the day reconciliation report should allow a remarks field to enter operator signatures and comments.

The system must allow receipts to be generated only after full payment has been received.

The system must have the ability to void current or past day's transactions and make corrections to receipts as required. All voided transactions must be documented in the system.

The system must endorse check with user-defined information such as: "For Deposit Only", transaction number, county official name, bank name, account number, date, and cashier ID.

The system must process all checks returned by banks. The transaction amounts must reverse the original posting amounts to reflect the correct dollar amounts in the accounts. The transaction must be fully documented and a history of returned checks maintained.

Once the transaction has been entered into the system, there can be no deletions or alterations made to that transaction. Changes to the cashiering system may be made only by offsetting transactions.

The system must allow all images to be available to the public for viewing without operator intervention.

The system will maintain response time regardless of increased filing volumes or number of workstations accessing the system.

The system should be able to pre-determine the amount of time a workstation monitor stays on line (off after five minutes of inactivity) for cashiering, public retrieval, etc.

The system must be capable of producing hard copies immediately after imaging. The software must allow images to be printed either page by page or as an entire document.

The software must allow images or selected portions of an image to be enlarged for clarification. Software must allow images to be rotated or adjusted and to reverse the image from white to black and vice versa.

Safeguards must be included to prevent the deletion or alteration of any image.

The system must provide scanning processing software that will automatically sharpen images. The operator must be able to bypass this feature and manually adjust the image.

### **Local Installation and Workstation Requirements**

The system must be web based and use industry accepted and standard web browsers to access and utilize all cashiering, recording, searching, reporting and administrative applications.

The system requires vendor provided software applications on the user personal computers. This includes any required browser plug-ins or locally installed utilities. Also, device support such as scanners and credit card swiping devices, or software required to integrate with a required third-party application such as TxEver.

All computer workstations must be new and must have the most current specifications and operating system in order to meet or exceed workload demands. Monitors must be high resolution and large enough (27") to view programs in dual page display mode.

All user workstations must include Microsoft Word, Excel and Adobe Acrobat for use with existing forms.

All administrative computers must include Microsoft Office and Adobe Acrobat DC.

There must be no need for a workstation to be touched, human or electronically, when a new version of the system is provisioned.

### **Environment**

Vendor will provide equipment and internet connectivity for (2) offsite locations within the county.

The system must implement industry open standards in hardware and software to protect the County's investment and offer distributed processing capabilities, allowing information to flow transparently between the proposed imaging system and the County's existing systems.

The system will be capable of accommodating multiple third party e-filing entities that could help increase e-filed documents in Hidalgo County. Any and all third parties capable of providing this

service to Hidalgo County shall be allowed to e-record documents in Hidalgo County at no additional cost to Hidalgo County, third party, or the filer.

### **System Server Requirements**

All system servers must be managed by the vendor and hosted in a secure, high availability, public cloud data center.

Advanced security must be provided by the cloud data center hosting vendor including periodic vulnerability testing, intrusion detection and monitoring, and encrypted data storage.

All system servers must be hosted in a leading public cloud platform such as Amazon Web Services, Microsoft Azure or Google Cloud.

There must be no requirement for any servers to be installed within the County facilities.

All data must be stored in the data center and immediately replicated to a secondary, geographically remote data center.

All system services and servers must be redundant and support immediate fail-over in the event of a service or server outage or slowdown.

All data must be continually backed up and any system roll back must not be any more than 15 minutes prior to introduction of issue causing the roll back.

With the exception of having to rollback any data, any system failover must be transparent to the user.

All system data backups must be copied and transported to an off-site location no less than daily.

System backups must be kept for a minimum of one year.

### **Networking Requirements**

Any infrastructure (switches/routers) required to connect users to the system will be provided by the vendor. The internet connection will be provided by the county.

The system must work with industry standard network and internet connectivity routing protocols.

The system must work with and be able to utilize redundant or multiple internet circuits.

The county will assist the vendor with any routing requirements. Any routing configuration required to connect to the system will be the responsibility of the vendor.

### **System Security - Data**

All data must be encrypted when being transmitted from a workstation to any internal or external service (all data in motion.)

All Personally Identifiable Information as defined by Texas Statute will be encrypted while being stored (data at rest)

All servers will be protected with virus scanning software.

All services, servers and the network that they are running on, shall be protected with advanced threat detection, mitigation and notification capabilities.

A notification of any unwarranted or unapproved access to any services or servers will be made to the County in less than one hour of the vendor becoming aware of the access.

### **System Security - User Authentication**

User Authorization: The system must support single sign-on and utilize the County's existing Active Directory server.

Control of access to the system must be controlled by the County's Active Directory service and user authentication activation and deactivation must be done and only done through Active Directory.

The system shall not block or prohibit any Active Directory user management capabilities such as password expiration policies, etc.

The system must provide workstation level security in that only approved workstations may be permitted to perform cashiering and recording.

The system must ensure that all workstations performing cashiering and recording are within a County approved IP address range.

### **System Security - User Authorization**

User Authorization. The system must allow security profiles be created and enforced such that different users are able to perform different roles as defined by the County.

Peripherals such as printers and scanners can be assigned to user security profiles or workstation security profiles.

Configurable Group profiles must be supported and individual users assigned to groups must inherit group security profiles.

Security profiles must be configurable specifically to the County requirements to the field level such that the fields displayed to the user and the users edit rights to those fields is based on that user's security profile.

Security profiles must be configurable specifically to the County requirements to the screen action level such that any action within an application or screen within an application can be filtered based on the security profile.

Security profiles must be configurable specifically to the County requirements at the workflow level to enable filtering of what applications a user may have access to.

## **Support Requirements -Support Hours**

Real-time support must be available to County staff one hour before and one hour after normal County business hours.

During periods of maintenance, system migration, or system upgrade, support personnel will be available to the County.

Real-time Public Access support must be provided to the public 24 hours per day and 7 days per week and staffed with dedicated support technicians. Public Access Support must be multi-lingual and at a minimum in English and Spanish.

Support to the County should be available through web, chat, email or phone communication channels.

All support calls that require any follow-up for closure should be tracked in a ticket management system.

The ticket management system must be available to County personnel for entering new tickets, tracking existing tickets, and adding information into tickets.

During support hours, County inquiries should be acknowledged by a live support technician in no more than 5 minutes from the time of the inquiry.

The Public Inquiry system must contain a user community web site that allows Public Inquiry users to provide feedback.

## **Support Personnel Location**

Primary support personnel must be in the state of Texas and be available to be on-site at the County offices within one hour.

During system migrations, upgrades or conversions, support personnel must be available on-site.

If the County requires, permanent on-site support staff must be provided.

Quarterly updates of software as needed.

Any requirement to move the vendor's equipment due to mandatory relocation (New Courthouse) of the clerk's office will be the responsibility of the vendor.

## **Initial and Ongoing Training**

Training of County users, Public Inquiry users and any other County staff who will interact or support the system will be provided classroom training at a County selected location and customized to reflect the County configuration of the system.

Ongoing training must be available to new users or to introduce new system functionality. This training may be one on one or computer based.

The Public Inquiry system must include tutorials and a maintained knowledge base to support the training of new Public Inquiry users.

All training materials must be provided to the County in a format that allows the County to utilize and enhance the training at the County's discretion.

### **Test System Access**

A test system must be available to the County and at a County designated location. The test system must be available to the County prior to initial go-live and for the duration of the system contract.

The test system must contain County approved and provided test data

The test system must allow for County users to validate new system features and configuration changes.

### **System Backup and Off-site Data Storage**

Vendor shall provide off-site storage in the State of Texas for copies of all images, index databases, and microfilm at no additional cost to Hidalgo County. Vendor's off-site storage facilities must meet or exceed current ANSI standards and applicable Texas State Library requirements.

Microfilm must be stored in a climate controlled offsite vault facility in Texas. Vault must be fire resistant and have 24/7 camera monitoring along with full time security services provided.

In the event a more efficient technology becomes available, vendor guarantees to convert County's data to a media acceptable to the new technology. Vendor must also provide an acceptable timetable for the conversion at no additional cost to Hidalgo County.

### **Documentation**

Vendors shall provide full documentation and information regarding backup procedures and responsibilities.

Vendor shall provide full documentation and information regarding disaster recovery procedures.

### **Uptime**

System uptime is a primary concern of Hidalgo County. Vendor shall provide complete information on system availability and reliability along with fallback procedures in case of equipment failure.

Battery backup on all servers, switches, routers & workstations at the Hidalgo County Clerk's Office and McAllen substation is required to ensure proper shutdown procedures.

### **Image Printers**

There shall be no limiting factor on the number of printers attached to the system. Printers must use laser technology with a minimum speed of 50 pages per minute. It is required that all printers be network attached and able to print images at the printer's rated speed.

**Scanners**

Individual workstation scanners must be capable of scanning up to a minimum of 300 dpi at a sustainable rate of not less than 50 pages per minute and handle legal and letter size documents. In addition, software to enhance document clarity will also be required.

**Cashiering Workstations**

Cashiering Workstations will be compatible with the other PCs and will include a cash drawer, a receipt-printing device capable of printing all required stamps and receipts and validation information.

Some workstations will be required to work in a multi-software/network environment. Administrator accounts for selected personnel must be created for editing of indices or records.

**Hardware Requirements**

The system will require a minimum of the following hardware and peripherals:

Department	Computer	Printer	Scanner	Cashier	DVD Rec
Vitals	5	5	5	5	0
Recording	5	5	5	5	1
Bookkeeping	3	3	3	3	0
Deeds	2	2	2	2	0
McAllen	3	3	3	3	0
Public Main	3	0	0	0	0
Public McAllen	3	0	0	0	0
Admin	4	2	2	0	4
<b>Total</b>	<b>28</b>	<b>20</b>	<b>20</b>	<b>18</b>	<b>5</b>

**TERM OF CONTRACT**

The initial term of this contract shall be for a four (4) year period after date of award of contract with the County's option to extend for an additional one (1) year under the same rates, terms, and conditions. The system must be implemented and fully operational within one-hundred eighty (180) calendar days from date of contract award.

Hidalgo County reserves the right to renew this contract on a month to month basis for a period not to exceed six (6) months, under the same rates, terms, and conditions at the end of the contract term for unforeseen delays in award of new bid for next contract term.

**PROPOSERS ARE TO PROVIDE A FEE SCHEDULE WITH THIS SUBMITTAL:**

Proposer(s) is to provide a proposed fee on proposal page based on the scope of services/work requested.

## SECTION III – SELECTION/EVALUATION/RANKING

**A. SELECTION/EVALUATION/RANKING PROCESS:** The RFP shall be submitted according to the schedule below. The County of Hidalgo is not required to select the proposal with the lowest fees, but shall take into consideration other factors, including past experience, evidence of good organization background, references, ability to provide requested services, and any other factors found necessary for quality services including a presentation of the proposed system. Hidalgo County will evaluate the proposal utilizing the evaluation criteria outlined in Exhibit “B” attached herein. Thereafter, Hidalgo County Commissioners Court will rank and/or award this proposal.

During the evaluation process, Hidalgo County reserves the right to request additional information or clarification from proposers. At the discretion of Hidalgo County, proposers may be requested to make oral presentations or demonstrations as part of the evaluation process.

**Proposals will be graded on a 100-point system with emphasis on ability to service Hidalgo County including, but not be limited to, the items listed below:**

1. **Understanding the Services/Methodology.** Company must state the approach and or methodology in achieving and rendering all services required by the County of Hidalgo.  
**25 points**
2. **Ability to commit to all Services Required.** Company should provide as much background information as to its experience in providing similar services to City, County or any other governmental agencies. Reference information should be as current as possible, especially contact persons and telephone numbers.  
**30 points**
3. **Ease of Support System & Response Time.** Ease of communicating with company’s support system and the company’s ability to have trained response team/person at service site. Qualified/trained response team (person) should be able evaluate, diagnose and/or begin service immediately.  
**20 points**
4. **Cost Fees and Warranty.** In considering the proposals, Hidalgo County reserves the right to select the acceptable applicant who offers contractual terms and conditions that are most advantageous, including but not limited to software price and services price per day/hour.  
**25 points**

**Total 100 Points**

**B. RANKING OF PROPOSALS:**

Hidalgo County Clerks will evaluate and score the RFP responses. After the RFPs have been evaluated and scored, Hidalgo County will make a recommendation to Hidalgo County Commissioners Court for approval of rank and/or award of proposal.

**C. NEGOTIATION PROCESS:**

Compliance with all requirements, the most cost productive, efficient and effective plan will be considered. Emphasis will be placed on capability to perform within the program as well as meeting the needs of Hidalgo County. Accuracy and completeness are essential. If negotiations proved unsuccessful, the next highest ranked proposer will be contacted. Hidalgo County reserves the right to reject any and all RFPs.