

THE STATE OF TEXAS
COUNTY OF WILLIAMSON

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**CONSULTING SERVICES
CONTRACT
(For Williamson County Clerk
Official Records Software System
RFP Project)**

Important Notice: County Purchase Orders and Contracts constitute expenditures of public funds, and all vendors are hereby placed on notice that any quotes, invoices or any other forms that seek to unilaterally impose contractual or quasicontractual terms are subject to the extent authorized by Texas law, including but not limited to Tex. Const. art. XI, § 7, the Texas Government Code, the Texas Local Government Code, the Texas Transportation Code, the Texas Health & Safety Code, and Opinions of the Texas Attorney General relevant to local governmental entities.

THIS CONTRACT is made and entered into by and between **Williamson County, Texas** (hereinafter "The County"), a political subdivision of the State of Texas, acting herein by and through its governing body, and **Darrell W. Eichman d/b/a Eichman Software Consultants**, (hereinafter "Service Provider"). The County agrees to engage Service Provider as an independent contractor, to assist in providing certain operational services pursuant to the following terms, conditions, and restrictions:

I.

No Agency Relationship & Indemnification: It is understood and agreed that Service Provider shall not in any sense be considered a partner or joint venturer with The County, nor shall Service Provider hold himself out as an agent or official representative of The County unless expressly authorized to do so by a majority of the Williamson County Commissioners Court. Service Provider shall be considered an independent contractor for the purpose of this agreement and shall in no manner incur any expense or liability on behalf of The County other than what may be expressly allowed under this agreement. The County will not be liable for any loss, cost, expense or damage, whether indirect, incidental, punitive, exemplary, consequential of any kind whatsoever for any acts by Service Provider or failure to act relating to the services being provided. Service Provider agrees to indemnify, hold harmless, and defend The County against any claim, demand, loss, injury, damages, action, or liability of any kind against The County resulting from any services Service Provider perform on behalf of The County.

II.

No Waiver of Sovereign Immunity or Powers: Nothing in this agreement will be deemed to constitute a waiver of sovereign immunity or powers of The County, the Williamson County Commissioners Court, or the Williamson County Judge.

III.

No Assignment: Service Provider may not assign this contract.

IV.

Compliance With All Laws: Service Provider agrees and will comply with any and all local, state or federal requirements with respect to the services rendered.

V.

Consideration and Compensation: Service Provider will be compensated as set forth in the attached Scope of Work/Proposal & Consultant Contract. Fees will be billed as set forth in Exhibits "A1 & A2," which are incorporated herein as if copied in full. Additionally, Texas law mandates as follows:

Payment for goods and services shall be governed by Chapter 2251 of the Texas Government Code. An invoice shall be deemed overdue the 31st day after the later of (1) the date The County receives the goods under the contract; (2) the date the performance of the service under the contract is completed; or (3) the date the Williamson County Auditor receives an invoice for the goods or services. Interest charges for any overdue payments shall be paid by The County in accordance with Texas Government Code Section 2251.025. More specifically, the rate of interest that shall accrue on a late payment is the rate in effect on September 1 of The County's fiscal year in which the payment becomes due. The said rate in effect on September 1 shall be equal to the sum of one percent (1%); and (2) the prime rate published in the Wall Street Journal on the first day of July of the preceding fiscal year that does not fall on a Saturday or Sunday.

VI.

Services: Service Provider shall provide services *as an independent contractor* pursuant to terms and policies of the Williamson County Commissioners Court. Service Provider expressly acknowledges that it is not an employee of The County. The services include, but are not limited to the following items in order to complete the project:

1. As described in the attached Statement of Work/Proposal and marked

2. **Exhibit “A1,” which is incorporated herein as if copied in full;
As described in the attached Consultant Contract marked Exhibit
“A2,” which is incorporated herein as if copied in full; and**
3. **If applicable to this project, the Williamson County Vendor
Reimbursement Policy, as amended.**

VII.

Entire Contract & Incorporated Documents: This Contract constitutes the entire Contract between the parties and may not be modified or amended other than by a written instrument executed by both parties. Documents expressly incorporated (as if copied in full) into this Contract include the following:

1. **As described in the attached Statement of Work/Proposal and marked
Exhibit “A1,” which is incorporated herein as if copied in full;**
2. **As described in the attached Consultant Contract marked Exhibit
“A2,” which is incorporated herein as if copied in full; and**
3. **If applicable to this project, the Williamson County Vendor
Reimbursement Policy, as amended.**

The County reserves the right and discretion (pursuant to public policy and Texas Constitutional principles) to determine applicable provisions where there is any conflict between this contract and any of the above-referenced contract documents/exhibits or incorporated documents.

VIII.

Good Faith Clause: Service Provider agrees to act in good faith in the performance of this agreement.

IX.

Confidentiality: Service Provider expressly agrees that he or she will not use any incidental confidential information that may be obtained while working in a governmental setting for his or her own benefit, and agrees that he or she will not enter any unauthorized areas or access confidential information and he or she will not disclose any information to unauthorized third parties, and will take care to guard the security of the information at all times.

X.

Termination: This agreement may be terminated at any time at the option of either party, without future or prospective liability for performance upon giving thirty (30) days written notice thereof.

XI.

Venue and Applicable Law: Venue of this contract shall be Williamson County, Texas, and the laws of the State of Texas shall govern all terms and conditions.

XII.

Effective Date and Term: This contract shall be in full force and effect when signed by all parties and shall continue for a reasonable time period for the specific project and shall terminate upon project completion or when terminated pursuant to paragraph X above.

XIII.

Severability: In case any one or more of the provisions contained in this agreement shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision in this agreement and this agreement shall be construed as if such invalid, illegal, or unenforceable provision had never been contained in it.

XIV.

Right to Audit: Service Provider agrees that The County or its duly authorized representatives shall, until the expiration of three (3) years after final payment under this Agreement, have access to and the right to examine and photocopy any and all books, documents, papers and records of Service Provider which are directly pertinent to the services to be performed under this Agreement for the purposes of making audits, examinations, excerpts, and transcriptions. Service Provider agrees that The County shall have access during normal working hours to all necessary Service Provider facilities and shall be provided adequate and appropriate work space in order to conduct audits in compliance with the provisions of this section. The County shall give Service Provider reasonable advance notice of intended audits.

XV.

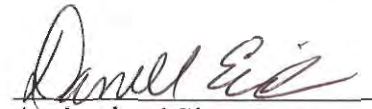
County Judge or Presiding Officer Authorized to Sign Contract: The presiding officer of The County's governing body who is authorized to execute this instrument by order duly recorded may execute this contract on behalf of The County.

WITNESS the signatures of all parties in duplicate originals this the 20th day of OCTOBER, 2015.

WILLIAMSON COUNTY:


Authorized Signature

SERVICE PROVIDER:


Authorized Signature

Proposal to Provide Professional Services:

Williamson County Clerk's Office
Request for Proposal Project

September 21, 2015



September 21, 2015

Honorable Nancy Rister
Williamson County Clerk
405 Martin Luther King St
Georgetown, Texas 78626

Dear Ms. Rister:

We are pleased to present this proposal to Williamson County Clerk to develop an RFP for an Official Public Records, Cashiering, Indexing and Imaging System. Eichman Software Consultants is a highly qualified and experienced team of local government and technology professionals. Our team provides the following:

- *Clerk/Recorder Subject Matter Expertise;*
- *High degree of knowledge of Texas Statutes relating to Clerk's office;*
- *Previous experience with numerous County Clerk offices in Texas;*
- *Understanding of the County's requirements for this project;*
- *Past performance on projects of this magnitude and complexity*

The team proposes to assist the Williamson County Clerk in creating a Request for Proposal that will include written technical and functional specifications for a County Clerk recording and document management system and assisting with the selection process. These services will be planned and delivered by a highly experienced and knowledgeable project team. Our team is familiar with Williamson County operations and has specific subject matter expertise.

We have presented a concise summary of our qualifications. Our fees are based on the assumptions made as to the scope of services and level of support you require. We are open to negotiate these options at your request in order to match our services with your specific needs. Our proposal is submitted with and conditioned on the understanding that upon award we will have the opportunity to negotiate a mutually agreeable contract.

We are eager and excited to extend our relationship with Williamson County with this challenging project. We look forward to meeting with you to present our approach and capabilities in more detail. In the meantime, please feel free to contact me at (512) 695-2322 or by e-mail at darrell.eichman@gmail.com if you have questions or require additional information.

Sincerely,



Darrell Eichman
Principal ESC

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Executive Summary

Introduction

Eichman Software Consultants (ESC) proposes to provide professional services to Williamson County Clerk for the analysis of the County Clerk's business processes, creation of written technical and functional specifications and a Request for Proposal (RFP), and assist in vendor evaluation and selection. This Executive Summary provides an overview of our proposal and presents the essential features and benefits of our approach.

Understanding Your Needs

ESC recognizes and understands the critical nature of the County Clerk's function and the related business processes to the stewardship of the County's records. While the immediate and pressing need is for support in the preparation of specifications and bid documents for a new recording and document management system, the County's long range goals are actually much more encompassing and pervasive.

The County Clerk's Office is responsible for processing approximately 9,600 documents per month in real property records. The County's current vendor, Thomson Reuters, supports the County Clerk's recording and document management processes and underlying technologies. The County Clerk's Office is interested in re-evaluating its approach to managing Official Public Records (which includes Vital Records). Specifically, the County Clerk's Office would like to:

- Save County resources
- Improve efficiencies
- Examine different processing models
- Issue an RFP and select a vendor that provides the County Clerk's Office the best solution for its recording and imaging needs for Official Public Records and Vital Statistics

Objectives

Understanding the issues Williamson County Clerk faces, the ESC Team supports the County Clerk's objectives. We are committed to helping you achieve your objectives in a highly professional and cost effective manner. Among the most important of the explicit project objectives are:

Official Public Records

- Develop and document technical and functional requirements for a new recording system.
- Create an RFP for a new system
- Assist Williamson County Clerk in reviewing vendor responses
- Facilitate the selection of a new recording system.

Project Scope

To complete the project, the team envisions a three-phase effort. The first phase focuses on the analysis of business operations of the County Clerk's Office. The purpose of this phase is to gather information related to current operations.

In the second phase, the team will create a Request for Proposal for the Williamson County Clerk to be distributed to qualified vendors.

In the third phase, the team will coordinate and facilitate the selection of an appropriate software package(s). This will include the evaluation of vendor proposals, conducting vendor demonstrations and site visits as necessary and other due diligence activities leading to a final software selection and contract negotiation.

Project Team Management & Staffing

Our Managing Consultant, Darrell Eichman, has over 10 years of County Clerk/Recorder experience with an emphasis on designing and implementing Clerk/Recorder systems. He has managed and participated in many consulting assignments that are directly applicable to the needs and requirements of the Williamson County Clerk.

Sandy Kennemer has over 5 years of business analysis and system implementation experience. Sandy has excellent communication skills and practical knowledge of requirements gathering.

Kay Kennemer, of K & Company, has an advisory role on this project. Kay is founder of K & Company, a state certified HUB vendor. Kay is a former Texas County & District Clerk and has years of experience in County Clerk systems.

For this and every consulting engagement, ESC's project management goals are to assure customer satisfaction by:

- Deliver to our clients the highest levels of service quality and to employ continuous improvement techniques
- Exceed our clients expectations
- Ensure strong communication between management and the project team

Why Select the ESC Team?

We understand that you have a choice in making this important selection. Our obligation, then, is to provide you with strong reasons for choosing our team. Among the many reasons our team is the best overall choice for Williamson County are the following:

- ***Our team is outstanding and respected.*** We offer direct, "hands-on" experience in Texas local government, strong functional knowledge of recording and document management systems, extensive information technology skills and an understanding of the Williamson County Clerk organization. Our team has assisted clients in all phases of recording and document management initiatives, from software selection through implementation to creation of custom systems. With this experience, we understand the various options for clerk recording systems and can work with you to identify the approach that best meets the County Clerk's needs and operating environment.
- ***Our project plan is comprehensive,*** offering a phased approach including three phases addressing all of the County's requirements and designed to provide "end to end" support.
- ***We bring an independent perspective to the assignment,*** being directly knowledgeable of the leading recording and document management products, yet independent of each.

- ***Our strong emphasis on cooperation and collaboration*** with our clients establishes the basis for mutual knowledge sharing and exchange of information.

Project Approach

Overview

ESC proposes to achieve the County Clerk's objectives through the completion of a three-phase project plan for each section. These phases include:

- Phase I – Business Process and Requirements Analysis
- Phase II – RFP creation
- Phase III – Technology Selection Process

Project Timeline

ESC expects the project to span about 3 months. A timeline is included as Exhibit D.

Benefits of our approach include:

- We will understand the County Clerk's business practices and identify any critical items for the new solution. Failure to adequately identify process improvement goals from the outset will significantly complicate the implementation and deprive the County of the ability to receive full benefits from the new technology.
- Our independent, fact-based selection process, including appropriate due diligence on the prospective technology vendors, will help to assure the County of an appropriate selection and focus on the long term success of the chosen solution in the context of the County's overall business and technology goals.

Phase I – Business Process and Requirements Analysis

The project approach impacts the degree of implementation success and effectiveness. We propose to begin the project by first gaining an understanding of the business and technical requirements for the recording and document management system. Areas include cashiering, scanning, indexing, and public access.

The specific objectives of this phase is to review Williamson County Clerks current business operations and processes with respect to recording and document management to understand current processes, which will help the County Clerk to define and select a new system.

Phase I - Approach

Organize and define project

- Confirm project objectives and scope to develop project calendar with major milestones.
- Conduct a "kick-off" meeting to inform county staff members of the project. Phase I includes up to 10 days on-site.

Gather Requirements

- Review current system flows, technical documentation, and procedure documents to familiarize team with existing operations. The existing operational areas to be covered are: Official Public Records (Deeds, Brands, Oaths, etc.), Assumed Names, Plats, DD214, Marriage Licenses, Birth Records, Death Records, and Public Access. Other areas include data conversion, hardware, training, support, and documentation requirements.
- Conduct interviews with key management and staff

Deliverables

The final deliverables for Phase I will include the following:

- Interview and observation summaries.
- Final presentation-style report of requirements.

Phase II – RFP Creation

The following activities are performed during this phase of the project:

Request for Proposal

Prepare an RFP for Official Public Records based on information gathered in Phase I. The RFP will contain the following:

1. Introduction
 - a) Purpose
 - b) County Organization
 - c) County Demographics
 - d) Current System
2. RFP Development
 - a) Pre-Bid Conference
 - b) Responding to Vendor questions
 - c) RFP event schedule
 - d) Vendor Presentations
 - e) Selection/Negotiations
3. RFP Instructions
4. RFP Evaluation
5. Proposal Format
6. General Requirements
7. System Requirements
8. Software Requirements
9. Hardware Requirements
10. Database Requirements
11. Application Requirements
12. System Support
13. Vendor Checklist
14. Sample Williamson County Contract

Note: Some sections may be altered depending on the findings from Phase I.

Review Draft RFP

- Review First Draft RFPs with County
- Apply changes to RFPs

Deliverables

- First Draft RFP, Final RFP

Phase III – Technology Selection Process

Our philosophy is simple: success based participation. We will assist the County Clerk's Office in every phase of the selection process from evaluating proposals to negotiating a contract. ESC will facilitate meetings, provide technical advice, coordinate all selection activities and provide a structured framework conducive to gaining consensus among the selection committee for the selection of a software vendor. We believe it is essential for the County Clerk's Office to take ownership in its selected product, as your staff will ultimately be responsible for the successful completion of the implementation project and long-term system operation. Our role is to facilitate vendor selection.

Phase III – Approach

ESC will work with the County's Clerk's Office to complete the following software selection activities:

Pre-bid Conference

- Plan pre-bid conference
- Attend pre-bid conference
- Assist with vendor questions from pre-bid conference

Evaluate Responses

- Provide functional and technical advice regarding the software vendor proposals
- Participate in vendor reference checks
- Facilitate the selection of 2 vendors for demonstrations

Conduct vendor software demonstration

- Coordinate setup activities, answer vendor questions and manage the software demonstration process
- Prepare agendas, facilitate discussion and keep demonstrations on schedule
- Coordinate all follow up for answers to questions and requests for additional information

Evaluate vendor software demonstrations

- Develop evaluation forms for the selection committee
- Summarize selection committee documentation
- Facilitate selection of 2 vendors for on-site demonstrations

Select Software Vendor

- Facilitate discussions among the selection committee members until the committee reaches consensus on the final vendors

Review Contract

- Review implementation services contract and software license agreement to advise the County on potential pitfalls

Contract Negotiations

- Advise selection committee on acceptable alternative solutions as necessary

Deliverables

The final deliverables for Phase III will include the following:

- Pre-bid Question and Answers
- Demonstration Evaluation Forms
- Rank Ordered Recommendation List
- Contract Review

Optional Phase IV – Project Management and Implementation Services

A precise cost estimate will be established on this phase once a vendor is selected. Similar projects of this size and scope typically range from \$9,500 to \$14,500.

The ESC approach is based on teamwork. We are highly experienced at working with hardware and software vendors, 3rd party contractors, independent consultants, as well as functional and technical employees in local government. The ESC Team has achieved success in this type of environment by being organized, detail oriented, and flexible. We take pride in being excellent communicators, problem solvers and skilled at issue resolution.

ESC will rely on the selected vendor to provide a detailed project plan. ESC will represent the County as project advisor. We will work directly with the vendor to make sure the project plan is followed. ESC will:

- 1) Review all assigned tasks for both County and Vendor to make sure milestones are met within allotted time for each section, such as:
 - a) Coordinate and attend vendor analysis sessions
 - b) Review sample sets of images/data to be converted to verify integrity
 - c) Review a sample set of training materials
 - d) Attend and monitor a Parallel day
 - e) Provide two days of onsite support after System Go-Live
 - f) Manage unforeseen issues and change requests for 30 days after System Go-Live date
- 2) Post-implementation follow-up weekly meetings for 30 days after System Go-Live date

Project Pricing

ESC is proposing a fixed fee contract to include all professional fees and expenses for Phases I, II and III in the amount of \$24,500 broken down as follows:

Official Public Records RFP

Phase I – Business Process and Requirements Analysis	9,500
Phase II – RFP Creation	5,500
Phase III – Technology Selection Process	<u>9,500</u>
Total Project	\$24,500

*

Resumes

Darrell W. Eichman, Managing Consultant

Credentials:

- B.B.A in Management Information Systems from University of Texas at Austin
- CDIA + Certified Document Imaging Architect
- Served on Committee as imaging subject matter expert to Revamp CDIA examination
- Speaker at State Recorder Conferences
- County Clerk subject matter expert
- Extensive experience in project management, analysis, development, implementation and support of County Clerk Recording and Imaging Systems

Summary of Experience:

Darrell formed Eichman Software Consultants in 1999 with the mission to assist County Clerks with technology projects and to be an advocate for Clerks to represent their best interests. Darrell has over 10 years experience working with County Clerks/Recorders across the country in various capacities such as consultant, project manager, business process analyst, and software development manager. Representative clients in Texas include Travis County, Williamson County, McLennan County, Fort Bend County, Galveston County, Jefferson County, and Midland County. Representative out of state clients include Mecklenburg North Carolina (Charlotte), Durham County North Carolina, King County Washington (Seattle), and Alameda County California (Oakland).

Consultant

- Managed effort to create a RFP for a County with the same circumstances as Williamson County Clerk. Additionally assisted in vendor evaluations and contract negotiations. The result was a successful project that significantly reduced operating costs. The implementation was completed on schedule and within budget.
- Advocate for several County Clerks in area of technology upgrades, reviewing Statement of Work plans for feasibility and fairness.
- Perform and Deliver Business Continuity Plans and services for various Counties. This critical area has helped several counties in times of crisis carry on statutory obligations.

Project Manager

- Managed many projects from assessment to implementation of new Recording/Imaging Systems in County Clerk's offices. The areas cover all departments in the Clerk's office: Official Public Records, Birth, Death, Marriage and County Courts. Besides working with many Texas County Clerks, Darrell's experience extends to many large counties in the country.

Software Development Manager

- Prior to forming Eichman Software Consultants, Darrell managed the software development effort for a major County Clerk Recording/Imaging vendor.

Sandy Kennemer, Business Analyst

Credentials:

- BS in Information System Management – University of Phoenix
- MS in Information System Management – University of Phoenix – September 2015
- Business process management, document management, workflow and imaging systems, data warehousing, financial analysis and project management experience

Summary of Experience:

Sandy has worked in a variety of positions in the commercial sector, including business analyst, implementation manager and project leader.

Kay Kennemer, Advisor, K & Company

Credentials:

- Former Menard County, Texas County and District Clerk
- PMP - Project Management Professional
- CRM – Certified Records Manager
- CDIA + Certified Document Imaging Architech
- Extensive experience in project management, analysis, development, implementation and support of County Clerk Recording and Imaging Systems

Summary of Experience:

Kay has been involved with implementation and professional services to state and local governments for over 20 years. In 2015, Kay established K & Company, a consulting company that is focused on providing services to local government agencies who need assistance with technology projects.

Consultant/Project Manager

- Over 8 years of experience managing multi-million dollar software implementation projects integrating Commercial Off-the-Shelf software solutions and providing project management oversight
- From 1995 to 2007, worked specifically in software development and implementation of proprietary software designed to manage County Clerk Real Property, Vital Records, Court Records and document imaging.

Prior Consulting Projects

ESC has the people, knowledge, experience and skills necessary to deliver top quality service to Williamson County Clerk. Our culture fosters inventiveness, knowledge sharing and a focus on client success. We are fully dedicated and committed to the public sector. Our team has direct experience in the areas most critical to your success: county government, document management and imaging systems, business process re-engineering, fee analysis, requirements gathering, technology selection and implementation. We apply our extensive government experience knowledge to adapt leading-edge private sector thinking and techniques to achieve results in the public sector. Illustrated below are a few of our projects that showcase our abilities to assist you in this endeavor.

Guilford County North Carolina

Register of Deeds – RFP Services

Darrell Eichman completed a project that included creating a RFP for the Guilford County ROD. The phases of the project included:

- Needs assessment
- RFP Creation
- Vendor Evaluation
- Implementation

During the project, ESC reviewed Official Public Records, Birth, Death, Marriage, DBA, and Plat Recording areas of the Clerk's office. This review led to the requirements for the Guilford County RFP. Vendor demonstrations were led by Darrell as well as site visits to selected from references of the vendors on the short list. The project was very successful leading to significant cost savings for the county as well as new technology.

Contact: Honorable Jeff Thigpen, Register of Deeds
 201 South Eugene Street
 Greensboro, NC 27502
 (352) 341-6412

Uvalde County Texas

County Clerk – RFP Services

ESC has a project underway that includes creating an RFP for the County Clerk's office and evaluating recording system vendors. The phases of the project include:

- Needs assessment
- RFP Creation
- Vendor Evaluation

During the project, ESC reviewed Land Records, Birth, Death, Marriage, DBA, and County Courts areas of the Clerk's office. This project is at the beginning of Phase II (RFP Creation).

Contact: Honorable Donna Williams
100 North Getty St
County Courthouse
Uvalde, TX 78801
830-278-6614

Exhibits

Exhibit A – Assumptions

- 1) Scope changes to this proposal are billed at \$120 per hour plus expenses. A scope change may be required for new tasks that are not part of this proposal or significant overage in resource allocation. A completed change order (Exhibit B) will be used to track such changes.
- 2) The Williamson County selection committee is ultimately responsible for choosing the successful vendor.
- 3) Williamson County will publish and release the RFP.
- 4) Phase III vendor demonstrations are confined to two (2) vendors.
- 5) Williamson County purchasing is the contact for RFP related vendor questions.
- 6) Williamson County purchasing will forward all RFP related questions to ESC for distribution to the selection committee.
- 7) Williamson County will assign someone to review the financial statements of vendors who respond to the RFP and provide an assessment to ESC.
- 8) Williamson County will be invoiced after each phase.

Exhibit B – Change Request

Change Request # _____

Date: _____

Description: _____

Estimated Amount: _____

To Be Billed: _____

Accepted by Darrell Eichman _____ Date _____

Accepted by Nancy Rister _____ Date _____

Exhibit C – Williamson County Clerk Responsibilities

1. Make attendance at any scheduled meetings mandatory for employees.
2. Provide a designated project manager to work with ESC consultants for the duration of the project.
3. Meet with ESC at mutually agreeable scheduled times.
4. Provide any local terms and conditions that are to be required in the RFP.
5. Provide necessary County information for areas outside the County Clerk's office, such as but not limited to, County MIS Standards.

Exhibit D – Timeline**Week 1 - 3 Phase I**

- Gather requirements on site (up to 10 Days)
- Requirements documented

Week 4 – 6 Phase II

- First Draft RFP and review
- Final RFP
- Release RFP

Week 7 – 9

- Pre-Bid Conference
- Allow time for Vendors to respond

Week 10 – 13 Phase III

- Review Responses
- Vendor Demonstrations (on site)
- System Selection
- Contract Review

Note: The timeline is meant to be used as a guideline and is subject to change.

Acceptance Forms

Phase I – Business Process and Requirements Analysis

Deliverables:

- Interview and observation summaries.
- Final presentation-style report of requirements.

Accepted by:

Williamson County Clerk

Eichman Software Consultants

By: _____

By: _____

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Phase II – RFP Creation

Deliverables:

- First Draft RFP
- Final RFP

Accepted by:

Williamson County Clerk

Eichman Software Consultants

By: _____

By: _____

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Phase III – Technology Selection Process

Deliverables:

- Pre-bid Question and Answers
- Demonstration Evaluation Forms
- Rank Ordered Recommendation List
- Contract Review

Accepted by:

Williamson County Clerk

Eichman Software Consultants

By: _____

By: _____

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____