

**ARLINGTON COUNTY, VIRGINIA
OFFICE OF THE PURCHASING AGENT**

REQUEST FOR PROPOSALS NO. 22-CCT-RFP-700

ADDENDUM NO. 1

Arlington County Request for Proposals No.22-CCT-RFP-700 for the Land Records Recording System is amended to include the County's response to questions, Revise and replace No.5 in the Scope of Services (page 14) and correct the numbering of the Proposal Submittal Elements (No.7 pages 17-19).

• **County's response to questions:**

1. Would Arlington consider entering a public-private partnership to create a new product that meets all of the business and technical requirements in its RFP for a Land Record Recording System? The result of the engagement would be a COTS solution that could be sold to other localities by the Vendor with royalties to Arlington. Our proposal would include a model for ongoing support to Arlington, regardless of our ability to sell the solution to other localities. Arlington would also enjoy a perpetual, irrevocable license to the solution and source code.
RESPONSE: No, the County has outlined the requested Proposal Requirements and the Evaluation Criteria in the solicitation.
2. Does the County have the need for the system have Adhoc Reporting?
RESPONSE: The system should have the ability to create customized reports on demand in addition to standard reports.
3. Can the county provide a list of all the necessary integrations for the new system go-live?
RESPONSE: The list of integrations is on pages 10-12 of the RFP.
4. Will the County accept proposals from vendors who do not have an installation in Virginia, but have over 75 Land Records Recording clients across 19 states?
RESPONSE: Yes. (See Scope of Services Revision)
5. Is the County interested in auto-redaction?
RESPONSE: Yes.
6. Is the County interested in auto-indexing?
RESPONSE: Yes.
7. Is the County interested in historical document digitization and indexing services? If so, approximately how many documents?
RESPONSE: Yes. The majority of historical land records have been indexed and scanned (2 million+). Less than 10,000 pages still need to be scanned and indexed.
8. Is the County open to a system with integrated document management?
RESPONSE: Yes, but in this case the project proposal will need to include the migration/conversion of all documents from current solution to the new solution.

9. How many users will utilize the new system? How many full-time County users will be using the proposed land records system?
RESPONSE: There are up to ten full time users and up to five part time users. This could increase with additional volume.
10. How many databases are there to be converted? What size?
RESPONSE: There is one database of transactional information that contains two million+ records that will need to be converted. There is a second database of images that may also need to be converted based on the offerors proposed solution.
11. One of the requirements states that “System offers the ability to alert CCT staff if a batch of documents has been rejected previously.” Typically, the electronic recording vendors like Simplifile and CSC do not provide that information when a submitter resubmits a package.
RESPONSE: We are interested in the solution including the ability to identify and alert Land Records if a filing has been previously rejected via the application.
12. Do you want a fully automated redaction solution? In the alternative, if a human is reviewing potential reactions, is that human review performed by Clerk staff or the vendor?
RESPONSE: We want a fully automated redaction solution.
13. Can you provide samples of the data sent to the Real Estate Assessment Office?
RESPONSE: We cannot provide a sample as that is app/system dependent. The data is exchanged between Land Records system and Real Estate Assessments system in both directions via ETL (Extract, Transform and Load) process at SQL.
14. There are two requirements that the system accept files and incorporate data from Arlington County Real Estate Assessments and the Falls Church assessment office. Can you explain what data is transferred and provide a sample file?
RESPONSE: We cannot provide sample as that is app/system dependent. The data is exchanged between Land Records system and Real Estate Assessments system in both directions via ETL (Extract, Transform and Load) process at SQL. The City of Falls Church information is manually imported via an excel spreadsheet.
15. Please describe the current integration with OnBase.
RESPONSE: Currently, images and index information for each transaction are stored in OnBase. The original image, either from an e-recording company or from a paper document scanned in office, is stored in OnBase. The final image with recording information that completes the transaction is also stored in OnBase. This is done automatically via the current software application communicating directly with OnBase and coordinating that communication between the e-recording companies and OnBase.
16. Could you clarify the specifics of the onsite support person for 2 weeks at go live?
RESPONSE: The Onsite person would serve as coach and trouble shooter to ensure the onsite staff can successfully record, access information, and trouble shoot problems as well as assist staff in supporting customers as they transition to a new database search application.
17. Is the County interested in the vendor providing a fraud prevention service for the public?
RESPONSE: Yes, but not required.
18. The RFP stated an 80% eRecording volume today, where are the 20% paper documents still coming from and has the County undertaken any campaigns to help increase that volume?
RESPONSE: The 20% paper land records documents are brought in by walk-in customers and through the mail. Walk-in and mail-in customers and Circuit court staff submit judgments only via paper filings, at this time.

19. The RFP states Judgements are part of the paper records received today. What are other example sources (i.e., local attorneys, title companies, other government entities, walk in customers, etc.)?

RESPONSE: Circuit court staff, local attorneys, individuals, government entities, walk-in and mail-in customers provide land record documents, judgments, and financing statements via paper submission.

20. For the Land Records and City of Falls Church Land Records imports, how does the import work to update RPC numbers and legal descriptions in the Land Records system Real Property Code database? Is that done through a report with manual updates, export/import, API?

RESPONSE: The information is manually imported via an excel spreadsheet. We are interested in automating this process.

21. What is the purpose of importing RPC and legal descriptions into the Land Record system?

RESPONSE: Importing RPCs and their legal descriptions from Real Estate Assessments ensures RPCs are active and related legal descriptions are consistent on documents to be recorded, prior to recordation.

22. Does the import update RPC and legal descriptions of recorded documents or does it just update RPC and legal description codes in the current system?

RESPONSE: The nightly import from the Real Estate Assessment database updates the Land Records recording application database of RPCs and Legal Descriptions. When Land Records staff members record each day, the customer submitted RPC on documents is entered into the application. The RPC number is a required field in recording a document. The application then auto-populates the RPCs related legal description from the newly updated import from Real Estate Assessments. The recorder checks to make sure the RPC and legal description are the same on the submitted document and in our database. This ensure the County Real Estate Assessments records and Circuit Court RPCs and legal descriptions are consistent and accurate.

23. What kind of information is imported for legal descriptions?

RESPONSE: The information is free form text.

24. Page 13 of the RFP states, "Solution should provide a minimum of 3 environments (test, stage/QA, production)." Is there a reason why test and QA could not be rolled into one environment to have a total of 2 environments (Production and Test/QA)?

RESPONSE: Yes, but our preference is to have 3 environments.

25. In Attachment B - the Offeror Response column looks like it may need a coded response (e.g., Y-Yes, current Capability; C-customization required; 3-third-party software required, etc.), but there is no corresponding key. Could you provide the key or clarify what you would like for each column?

RESPONSE: Attachment B has two Tabs, "Requirements" and "Instructions." The instructions for filling out the Requirements are in the Instructions tab.

- **Revise and replace Section IV Scope of Services, A. Required Elements, number 5 with the following:**

5. The system must integrate with the County's OnBase document storage system or provide an alternative that has a five-year-plus track record in document storage and management for at least one Commonwealth of Virginia jurisdiction or has been

successfully installed and is in production use in at least three other local government jurisdictions in a state other than Virginia.

- **Correction to numbered sequence Section V Proposal Requirements number 7, Proposal Submittal Elements as follows:**

7. PROPOSAL SUBMITTAL ELEMENTS (pages 17-19)

The County may not evaluate proposals that do not contain all requested content. Each of the proposal elements should be provided in the order listed below.

1. EXECUTED FORMS

- a. Proposal Form: original as detailed above.
- b. Contractor Compliance with County COVID-19 Vaccination Policy Certification: included in the RFP document.
- c. Conflict of Interest Statement: included in the RFP document.
- d. Addendum Acknowledgment Form(s): provided with any RFP addendum(s).

2. MANDATORY REQUIREMENTS

The following requirements are mandatory. If the County concludes after its initial review of a submitted proposal that the Mandatory Requirements are not met, the proposal will be considered non-responsive and will not be evaluated further.

- a. The Offeror may not take exceptions to mandatory provisions of the draft Contract Terms and Conditions that are attached to this solicitation. Mandatory provisions are marked with an asterisk. This requirement does not apply to contract provisions concerning liability, to which a successful Offeror may note exception at the beginning of contract negotiations.

Compliance with this mandatory requirement will be verified against the Offeror's exceptions, if any, to the County's draft Terms and Conditions.

- b. The offered Land Records system proposed for Arlington County must have the two primary components listed below that must have been successfully installed and are in production use in at least one other local government jurisdiction in Virginia or are successfully installed and are in production use in at least three other local government jurisdictions in a state other than Virginia:

- 1) recordation of Land Records, Judgments, and Financing Statements
- 2) searchable database of recorded documents that is accessible to external customers as well as internal staff by subscription.

3. UNDERSTANDING OF SCOPE AND PROJECT APPROACH

Stated commitment to providing a Land Records recording system and database solution for Arlington County meeting the requirements of the Commonwealth of Virginia and the County (no more than one page).

4. FUNCTIONAL, TECHNICAL, AND GOVERNANCE REQUIREMENTS

All Offerors must complete the Functional, Technical, and Governance Attachments, demonstrating and describing their capabilities to address stated requirements. (See attachments A, B, and C.)

5. DELIVERABLES

All Offerors must provide a Project Plan, with proposed dates and milestones, that outlines how they will complete the following tasks that will result in a fully functional Land Records Management System available for use in the production environment no later than May 1, 2023. The plan will outline the contractor's and County's tasks, will be revised as needed, and will serve as the project roadmap.

Task 1: Overall Plan, Timeline and Work Schedule

This overall plan, timeline and work schedule includes the scope, objectives, assumptions, constraints, risks, issues, resources, milestones, budget, project team, stakeholders, and roles and responsibilities that will guide the management of the project, along with a system migration strategy.

Task 2: Analyze and Validate Requirements

The Contractor will analyze business processes, workflows, business requirements, user requirements, functional requirements, and operational requirements to arrive at the optimal arrangement of the System. The Contractor will identify which requirements are met with the system's standard functionality and which require customization, Analyze System personnel support and address and resolve any potential staffing concerns, and state how functional requirements will be met. The Contractor will state how integration with On Base will be achieved.

Task 3: Prepare Implementation Approach

The Contractor will determine the best approach for meeting the County's requirements. For any necessary requirements not provided by the system, the Contractor will perform third party product evaluations. The Contractor will describe the approach to integrating the system into the County's existing infrastructure, including interfaces with internal and external systems and plans for data and file migration. The approach outlined will include an application configuration, user security matrix, interface design and specifications, and data model specifications.

Task 4: Implement the System

The Contractor will configure the system, develop customizations, develop interfaces, and integrate any necessary third-party products to develop a system that meets the County's requirements. This configuration will include the specification of the platform that includes the environment for development, testing, training, and production, including hardware requirements and third-party applications. It will also include the configuration of the system and i interfaces and integration with County systems.

Task 5: Convert the Data

The Contractor will extract, transform, and load all designated current and historical required data from the County's legacy system to the Contractor's System and any third-party applications. This should include a conversion strategy and converted data from the legacy system that is reconciled and validated.

Task 6: Test the System

Based on the requirements prepared during the requirements analysis task, the Contractor must develop a test strategy, test plan and test procedures. Upon approval of these documents, the Contractor must conduct the test, document the test results, make necessary repairs, and retest the System. The Contractor must provide a testing strategy, define desired testing results, and then certify that the system meets the project specification requirements.

Task 7: Prepare System Documentation

The Contractor must prepare the documentation necessary to allow users to understand the functions and features of the system and how to operate and monitor the system processes. All documentation must be written in clear, concise, easily understood and grammatically correct English. Data models must be provided in an industry format acceptable to our Department of Technology Services technical team. The documentation must include user documentation, a policies and procedures manual, system administrator documentation, technical documentation, installation instructions, and technical configurations.

Task 8: Train the Users

The Contractor must ensure that knowledge transfer has occurred by developing and implementing a plan such that the project team, users, system administrators, help desk, system operators, and tier-two support personnel (estimated 30 end users) are knowledgeable about the system and prepared to perform their duties associated with the on-going business and support operations in relation to the system and third-party products. The Contractor must include a training strategy and courses and provide training for users, operators, and support personnel.

Task 9: Production Implementation and Post- Production Support

The Contractor will provide an operational system, with on-site support for two months to resolve any functional and operational problems. The Contractor must provide user support and on-site support for legislative changes each fiscal year.

6. RESUMES

Provide detailed information regarding staff's knowledge and experience with land

records systems in Virginia. Describe how the Project Manager meets the County's experience requirements.

7. PAST PROJECTS

Provide a minimum of one example of a successful provision of land records recordation services and database interface and management in Virginia.

8. SYSTEM INTEGRATION AND INTERACTION

Stated and demonstrated ability to integrate the proposed solution with Arlington's OnBase database or description of an alternative solution with a proven track record of five years or more. Stated ability to interact with Commonwealth of Virginia Financial Accounting System requirements, integrate with Arlington's and Falls Church's Departments of Real Estate Assessments and property data. Stated and demonstrated ability to integrate and interact with third-party vendors to support redaction, scanning, and quality assurance services. Describe experience and provide a minimum of one customer reference related to the experience.

9. EXCEPTIONS TO THE COUNTY'S NON-MANDATORY CONTRACT TERMS AND CONDITIONS, if any.

10. COST PROPOSAL

The Offerors must use the Cost Proposal Spreadsheet included in this solicitation as Attachment D.

The balance of the solicitation remains unchanged.

Arlington County, Virginia

Vanessa Moorehead
Procurement Officer
vmoorehead@arlingtonva.us

RETURN THIS PAGE, FULLY COMPLETED AND SIGNED, WITH YOUR PROPOSAL:

OFFEROR ACKNOWLEDGES RECEIPT OF ADDENDUM NUMBER 1.

FIRM NAME: _____

AUTHORIZED SIGNATURE: _____ **DATE:** _____