

**SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

622



FROM: Assessor-County Clerk-Recorder


SUBMITTAL DATE:
March 12, 2013

SUBJECT: Approval of the Licensing, Professional Services and Maintenance and Support Agreement for a fully integrated Clerk and Recorder Document System (CARDS) with Tyler Technologies, Inc.

RECOMMENDED MOTION: That the Board of Supervisors:

- 1) Approve and execute the Licensing and Professional Services Agreement ("Agreement") with Tyler Technologies for a fully Integrated Clerk and Recorder System for a total amount of \$2,363,788; and,
- 2) Approve a five (5) year fixed maintenance and support Agreement for the CARDS System with Tyler Technologies, Inc, in the aggregate amount of \$1,322,362 as part of the Agreement, and,
- 3) Approve the CRIS+ *plus* Maintenance and Support contract renewal for the current system for two (2) years with Tyler Technologies, Inc. for an aggregate amount of \$350,086 to be signed by the Purchasing Agent; and,
- 4) Approve the one (1) Year RiverDocs Maintenance and Support contract renewal with Tyler Technologies, Inc. for an aggregate amount of \$48,500, with the option to renew for an additional two (2) one year periods not to exceed annually \$48,500 to be signed by the Purchasing Agent; and,

(Continued on Page 2)


Larry W. Ward
Assessor-County Clerk-Recorder

FINANCIAL DATA

Current F.Y. Total Cost:	\$ 0	In Current Year Budget:	No
Current F.Y. Net County Cost:	\$ 0	Budget Adjustment:	No
Annual Net County Cost:	\$ 0	For Fiscal Year: 2013/14	

SOURCE OF FUNDS: Recorder's Modernization Fund; Recorder's Conversion Fund; Recorder's Social Security Number Truncation Fund; Recorder's Electronic Recording Fund	Positions To Be Deleted Per A-30	<input type="checkbox"/>
	Requires 4/5 Vote	<input type="checkbox"/>

C.E.O. RECOMMENDATION:

APPROVE

BY: 
Karen L. Johnson

County Executive Office Signature

Prev. Agn. Ref.: Dec. 9, 2008; #3.13 | **District:** | **Agenda Number:**

FORM APPROVED COUNTY COUNSEL 1/13
 BY:  NEAL R. KIPNIS DATE
 Departmental Concurrence
 Purchasing:  Mark Seller, Assistant Director

Dept's Recomm.:
 Per Exec. Ofc.:
 Consent
 Policy
 Policy
 Consent

RE: System Selection Approval and five year Maintenance and Support Plan for a fully Integrated Clerk and Recorder Document System (CARDS)

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RECOMMENDED MOTION (continued)

- 5) Authorize the Purchasing Agent in accordance with Ordinance No. 459, to exercise the renewal option and to approve amendments to the contract that do not, in aggregate, exceed the 10% project contingency fund and sign amendments that do not change the substantive terms of the Agreement; and authorize the ACR Project/Delivery Manager to execute project-operational documents that do not change the scope of work, terms and conditions of the contract and have no fiscal impact.

BACKGROUND:

CLERK AND RECORDER SYSTEM REPLACEMENT - Our existing system, CRIS+, is approximately fifteen years old, heavily modified, built on an old technology platform and at the end of its life. Today's system does not have Customer self-service features or kiosk functionalities. Many of the current processes are performed with a great deal of manual intervention.

Furthermore, the current system has limited ability to support growth. The current solution has no new features that can be leveraged to improve customer service or increase business efficiency. New legislative requirements, such as Trusted Systems functionality, are unavailable with this version of the Software and virtually impossible to add.

The current system is not fully integrated; therefore, the ACR Department recommends that the current system be replaced with a fully Integrated Clerk and Recorder System. The recommended system is the Eagle Recorder System proposed by Tyler Technologies, which is the best solution that meets ACR's defined business requirements.

ONGOING MAINTENANCE AND SUPPORT DURING SYSTEM PROJECT – The ACR requires that the legacy system be maintained until the new proposed system is fully implemented. Therefore, maintenance renewal for ongoing support to the existing system during the first two years of the replacement Eagle Recorder System implementation is necessary. Depending upon Go-Live date, these fees may be pro-rated for services rendered for a partial year.

The ACR requires that the legacy system, RiverDocs, the Document Management System currently used by the Assessor, be maintained until the new proposed system is fully implemented. Therefore, maintenance renewal to provide ongoing support to the existing system during the first years of the replacement CREST (Enterprise Property System) Implementation is necessary.

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BACKGROUND (continued)

FINANCIAL IMPACT AND ANALYSIS

Description	FY 2014	FY 2015	FY 2016	FY2017	FY2018	FY2019	Total
Tyler Technologies							
Licensing and Professional Services Costs	\$ 2,363,788						\$ 2,363,788
Project Contingency Fund for State Mandates (10% of total)	\$ 236,379						\$ 236,379
FY 2014 – FY 2019 annual Maintenance and Support Costs		\$ 244,144	\$ 253,910	\$ 264,066	\$ 274,629	\$ 285,614	\$1,322,363
Total	\$2,600,167	\$ 244,144	\$ 253,910	\$ 264,066	\$ 274,629	\$ 285,614	\$3,922,530

At completion of the CARDS implementation, the fully integrated system will provide operational cost savings due to efficiencies and process improvements. Clerk and Recorder will focus on customer-centric features and functions such as the self-service terminals and kiosks. Additional benefits gained from the system replacement include, but are not limited to, the following:

- Improved ability to accommodate increased Clerk and Recorder workloads with existing staff as recording services increase with projected future County growth.
- Ability to implement and comply with legislative requirements for Trusted Systems and others.
- Improved public service and responsiveness to the public.
- Move towards completion of the record conversion back to the start of the County (1893).
- Reduction in paper as the County moves to Electronic media.
- Online customer service capabilities.

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BACKGROUND (continued)

- Improved accuracy of data as manual data entry is replaced by automation (scanning Driver's Licenses data and the ability to utilize OCR to update records.)
- Improved system error response and resolution times due to the move to current technology and a Commercial off the Shelf version of the system.
- Increased visibility and synergy between all Clerk and Recorder Offices in the County.
- Improved data and record security with the implementation of the Documentum Image Repository.
- Compliance with Riverside County Policies A43 - Records and Archives Policy, Policy A58 - County Enterprise Security Policy, and Policy A68 - Archives and Trusted Systems Policy.

The current Clerk and Recorder System represent significant business risk to the County if business continues in its current operational state. Risks associated with maintaining status quo are as follows:

- Inability to leverage new features, functions and processes of both the existing application and hardware platform will restrict the County from maintaining operational costs.
- Risk of system failure and loss dramatically increase as time progresses.
- Technological obsolescence will continue to drive support and maintenance costs upward as the availability of resources in the market continues to decrease.
- Inability to meet customer demand without additional resources added to perform existing manual processes.
- Inability to support the technology without additional resources in the form of personnel, parts, and/or outside technicians.
- With four disparate systems to support, the chances of continued fragmentation and its related impact on operations may prevent the County from data visibility.
- Inability to deliver legislative requirements without significant additional expenses.
- No ability to streamline business processes or deploy online services.
- Visibility and collaboration between offices and individual office performance will remain manual and difficult to manage.

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BACKGROUND (continued)

PRICE REASONABLENESS:

County Purchasing released a Request for Proposal (RFP) ASARC-050, to ensure the widest possibility of notification and competition. Purchasing sent notifications to all known vendors and contacts registered in the County database totaling over 350 individuals and/or companies as well as advertised on the County Purchasing's Internet Site. Five (5) responses were received ranging from \$3,169, 640 to \$5,145,944.

The Proposals were reviewed by an evaluation team consisting of personnel from Purchasing and ACR. The evaluation team reviewed and scored each Proposal based upon the bidder's responses to the following bid criteria:

- Financial Statements
- Detailed Requirements Responses
- Software Capability
- Technical Capability
- Overall Cost
- Reference Calls
- Client Site Visits

A scripted vendor product demonstration of the top three vendors were conducted over a three day period and ranked by the evaluation team. Additionally, references, site visits, and best and final offers with the top three vendors were requested and evaluated.

Based on the results of the scripted demos, references, site visits, and best and final offers, the County entered into negotiations with Tyler Technologies, Inc., the most responsive/responsible vendor submitting a proposal total cost that shall not exceed \$3,686,150. The other competing vendors proposed best and final offer costs ranging from \$2,984,125 to \$4,186,124.

The evaluation team recommends that the contract award be given to Tyler Technologies, Inc. as the most responsive/responsible and highest score vendor, with an aggregate amount of \$3,686,150.

REVIEW / APPROVAL:

- Purchasing and County Counsel have approved the agreement.



County of Riverside
Assessor- County Clerk - Recorder

ASARC-50
Integrated Clerk & Recorder System Agreement
for Licensed Software and Services
