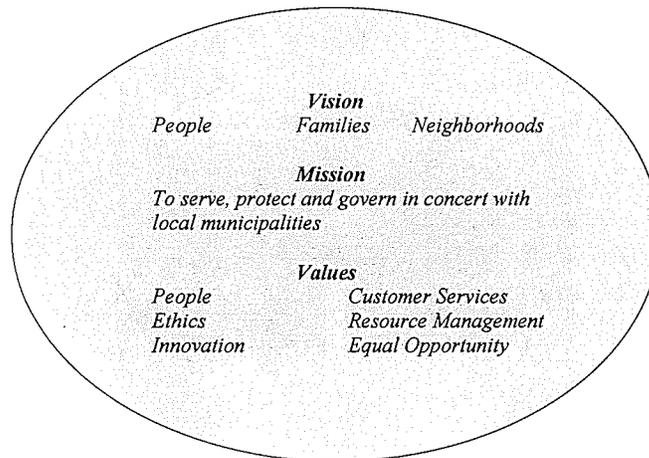




FULTON COUNTY



REQUEST FOR PROPOSAL NO. 12RFP84836B-BL

Lands Record Management System

For

Fulton County Superior Court-Clerk

RFP DUE DATE AND TIME: September 11, 2012 @11:00 AM Local Time

RFP ISSUANCE DATE: August 6, 2012

PRE-PROPOSAL CONFERENCE DATE: August 21, 2012

PURCHASING CONTACT: William E. Long, Jr., at (404) 612-7660

E-MAIL: william.long@fultoncountyga.gov

**LOCATION: FULTON COUNTY DEPARTMENT OF PURCHASING &
CONTRACT COMPLIANCE**

130 PEACHTREE STREET, S.W., SUITE 1168

ATLANTA, GA 30303

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SECTION 1 INTRODUCTION

1.1 PURPOSE

Fulton County, Georgia ("County") is to implement software application consisting of a 1) Lands Record Management System, including document imaging, workflow and record management system to deliver content to a single repository, which in turn provides needed information to all applications.

Fulton County, Georgia ("The County"), through the issuance of this Request for Proposal (RFP), is soliciting Proposers from qualified Proposers for the procurement an enterprise Lands Record Management System.

Proposals provided in response to this RFP that comply with the submittal requirements set forth in Section 7.0, including all forms and certifications, will be evaluated in accordance with the criteria and procedures described in Section 8.0. Based on the results of the evaluation, the County will award the project to the most advantageous Proposer based on the cost and the evaluation factors set forth in the RFP.

1.2 DESCRIPTION OF THE PROJECT

This project involves the acquisition, installation, training, and on-going software system maintenance support for Lands Record Management System software application.

BACKGROUND

The Fulton County Clerk of Superior Court is currently using a system developed by the Mainline Corporation, the Fulton County Land Records System, which the County has used for approximately 10 years. The Mainline Land Records System is now being supported by Iron Data Solutions, LLC. The County therefore wishes to replace the existing Mainline Land Records system with a modern document management solution.

1.3 COUNTY OBJECTIVES

The following are the County Objectives for this project:

- Provide better service to the public by improving the quality and quantity of information available and by providing easier access to the information
- Eliminate the need to create microfilm from original documents
- Provide a high level of accountability for all financial transactions
- Increase staff productivity and efficiency via the reduction of paper handling
- Have the ability to accept PRIA standard electronic recordings

1.5 PURCHASING THE RFP

This document and supporting documents can be downloaded at the Fulton County Website, <http://www.fultoncountyga.gov> under "Bid Opportunities".

1.6 SUBCONTRACTING OPPORTUNITIES

Potential prime contractors submitting a bid on this project for Fulton County and are seeking subcontractors and/or suppliers can advertise those subcontracting opportunities on the County's website, <http://www.fultoncountyga.gov> under "Subcontracting Bid Opportunities".

1.7 PRE-PROPOSAL CONFERENCE

The County will hold a Pre-Proposal Conference, on **Tuesday, August 21, 2012 at 2:00 PM** in the Bid Conference Room of the Department of Purchasing and Contract Compliance, Fulton County Public Safety Building, Suite 1168, 130 Peachtree Street, S.W., Atlanta, Georgia 30303. Attendance at the Pre-Proposal Conference is voluntary for responding to this RFP, however Proposers are encouraged to attend. The purpose of the Pre-Proposal Conference is to provide information regarding the project and to address any questions and concerns regarding the services sought by the County through this RFP.

1.8 PROPOSAL DUE DATE

All proposals are due in the Department of Purchasing and Contract Compliance of Fulton County located in the Public Safety Building, Suite 1168, 130 Peachtree St, S.W., Atlanta Georgia 30303 on or before **Tuesday, September 11, 2012 at 11:00 A.M.**, legal prevailing time. All submitted proposals shall be time and date stamped according to the clock at the front desk of the Fulton County Department of Purchasing and Contract Compliance. Any proposals received after this appointed schedule will be considered late and will be returned unopened to the Proposer. The proposal due date can be changed only by addendum.

1.9 DELIVERY REQUIREMENTS

It shall be the sole responsibility of the Proposer to have his/her proposal delivered to the Fulton County Department of Purchasing and Contract Compliance for receipt on or before the above stipulated due date and time. If a proposal is sent by U.S. Mail, the proposer shall be responsible for its timely delivery to the Department of Purchasing and Contract Compliance.

1.10 CONTACT PERSON AND INQUIRIES

Any questions or suggestions regarding this RFP shall be submitted in writing to

the Purchasing Department contact person, William E. Long, Jr., Chief Assistant Purchasing Agent, 130 Peachtree Street, S.W., Suite 1168, Atlanta, Georgia 30303, Telephone: (404) 612-7660, Email: william.long@fultoncountyga.gov. Any response made by the County shall be provided in writing to all Proposers by addendum. No verbal responses shall be authoritative.

SECTION 2 INSTRUCTIONS TO PROPOSERS

2.1 PROCUREMENT PROCESS

The procurement will be on a formally advertised basis. All technical requirements, unless otherwise specified, must be met, or be capable of being met by the Proposer or their proposal will be disqualified as being non-responsive.

2.2 CONTRACT DEFINITIONS

In addition to any other terms that may be defined in this solicitation, the following terms have the following meaning:

Addendum – Revision to the RFP documents issued by the County prior to the receipt of proposals.

Agreement – refers to the executed contract between the County and Contracting Entity.

County – Fulton County Government and its authorized representatives.

Contact Person – Purchasing staff designated by the Fulton County Department of Purchasing and Contract Compliance to submit any questions and suggestions to.

Offeror – the entity of individual submitting a proposal in response to this RFP.

Owner – Fulton County Government

Proposal – the document submitted by the offeror in response to this RFP.

Proposer – the entity or individual submitting a proposal in response to his RFP.

Request for Proposal (RFP) – all documents, whether attached or incorporated by reference, utilized for soliciting sealed proposals.

Responsible Offeror – A person or entity that has the capability in all respects to perform fully and reliably the contract requirements.

Responsive Offeror – A person or entity that has submitted a bid or proposal that conforms in all material respects to the requirements set forth in the invitation for bids or request for proposals.

Scope of Work – All the services specified, indicated, shown, or contemplated by the Contract, and furnishing by the Contractor of all materials, equipment, labor, methods, processes, construction and manufacturing materials and equipment, tools, plants, supplies, power, water, transportation and other things necessary to complete such services in accordance with the Contract.

Subcontractor/sub-consultant – An individual, firm, corporation or any combination thereof, having a direct contract with Consultant/Contractor for the performance of a part of the work.

2.3 NO CONTACT DURING PROCUREMENT PROCESS

It is the policy of Fulton County that the evaluation and award process for County contracts shall be free from both actual and perceived impropriety, and that contacts between potential vendors and County officials, elected officials and staff regarding pending awards of County contracts shall be prohibited.

- A. No person, firm, or business entity, however situated or composed, obtaining a copy of or responding to this solicitation, shall initiate or continue any verbal or written communication regarding this solicitation with any County officer, elected official, employee, or designated County representative, between the date of the issuance of this solicitation and the date of the County Manager's recommendation to the Board of Commissioners for award of the subject contract, except as may otherwise be specifically authorized and permitted by the terms and conditions of this solicitation.
- B. All verbal and written communications initiated by such person, firm, or entity regarding this solicitation, if same are authorized and permitted by the terms and conditions of this solicitation, shall be directed to the Purchasing Agent.
- C. Any violation of this prohibition of the initiation or continuation of verbal or written communications with County officers, elected officials, employees, or designated County representatives shall result in a written finding by the Purchasing Agent that the submitted bid or proposal of the person, firm, or entity in violation is "non-responsive", and same shall not be considered for award.

2.4 CLARIFICATION & ADDENDA

Proposers may submit requests for clarifications or interpretations regarding this RFP and the Contract. Proposers must prepare such requests in writing for the County's consideration as set forth in this section of this RFP. While the County has

not placed an initial limitation on the number of requests which can be submitted, Proposers are cautioned that if Proposers do not request meaningful clarifications or interpretations in an organized manner (e.g., limited frequency of requests), the County will set restrictions on the frequency and number of requests permitted. The County will not respond to requests, oral or written, received after **Tuesday, August 28, 2012 at 5:00 PM**, local prevailing time. Proposers are advised that this section places no obligation on the part of the County to respond to any or all requests for clarification or interpretation, and that the County's failure to respond to any such request will not relieve the Proposer of any obligations or conditions required by this RFP.

Requests for clarification or interpretation regarding this RFP shall only be submitted in writing (letter, fax or email) to:

Fulton County Department of Purchasing & Contract Compliance

Attn: William E. Long, Jr.

Public Safety Building

130 Peachtree Street S.W. Suite 1168

Atlanta GA 30303

Email: william.long@fultoncountyga.gov

F: (404) 893-6268

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Telephone inquiries will not be accepted.

All responses to written requests for clarification, interpretation, or additional information will be distributed as addenda to this RFP and posted on the Fulton County website www.fultoncountyga.gov.

No oral interpretation, instruction, or information concerning this RFP given by any employee or agent of the County shall be binding on the County. Proposers who submit a Proposal in reliance on any such oral information risk having their response to this RFP deemed non-responsive by the County. Only written responses issued by addendum to this RFP should be considered by the Proposers.

During the period provided for the preparation of Proposals, the County may issue addenda to this RFP. These addenda will be numbered consecutively and will be posted on the Fulton County website, www.fultoncountyga.gov. These addenda will be issued by, or on behalf of, the County and will constitute a part of this RFP. Each Proposer is required to acknowledge receipt of each addendum by submitting an executed acknowledgment form. This acknowledgment shall include all addenda distributed prior to the Proposal Submission Date. All responses to this RFP shall be

prepared with full consideration of the addenda issued prior to the Proposal Submission Date.

2.5 TERM OF CONTRACT

The initial term of the contract shall be for a one (1) year term, with two (2), one (1) year renewal options.

2.6 RFP SUBMITTALS

See **Exhibit 1** for the RFP Submittal Checklist. This checklist will assist you to ensure that all submittals are included in your proposal. Failure to submit all submittals may deem your proposal non-responsive.

2.7 PROPOSAL EVALUATION

All proposals will be evaluated using the criteria specified in Section 4 of this RFP. Selection will include an analysis of proposals by a Vendor Selection Committee composed of County personnel who will review the proposal submittals in accordance with the submittal requirements and the evaluation criteria set forth in Section 4 of this RFP. The committee may request oral interviews and/or site visits. Awards will not necessarily be based on cost alone. Other factors, as detailed in the RFP, will be considered in determining what proposal will be deemed to best meet the needs of Fulton County.

2.8 DISQUALIFICATION OF PROPOSERS

The submission of more than one (1) proposal to the County as the primary Proposer or member of a joint venture for the same work by an individual firm, partnership or corporation under the same or different names may be grounds for disqualification of a Proposer and the rejection of the proposal.

2.9 RESERVED RIGHTS

The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response that is received may or may not be rejected by the County depending on available competition and timely needs of the County. There is no obligation on the part of the County to award the contract to the lowest proposer and the County reserves the right to award the contract to the responsible proposers submitting responsive proposals with resulting agreements most advantageous and in the best interest of the County. The County shall be the sole judge of the proposals and the resulting agreements that are in its best interest and its decision shall be final. Also, the

County reserves the right to make such investigation as it deems necessary to determine the ability of any proposer to perform the work or service requested. Information the County deems necessary to make this determination shall be provided by the proposer. Such information may include, but shall not be limited to, current financial statements by an independent CPA; verification of availability of personnel; and past performance records.

2.10 APPLICABLE LAWS

All applicable laws and regulations of the State of Georgia and ordinances and regulations of Fulton County shall apply. Protestors shall seek resolution of their complaints in the manner provided in the Fulton County Code of Laws §2-324 which is incorporated by reference herein.

2.11 MINIMUM PARTICIPATION REQUIREMENTS FOR PRIME CONTRACTORS

Pursuant to Fulton County Code 102-357, Prime Bidders on the project must perform no less than 51% of the scope of work required under the project.

2.12 INSURANCE AND RISK MANAGEMENT PROVISIONS

Insurance and Risk Management provisions and Indemnification and Hold Harmless provisions are outlined in Section 7 of this RFP.

2.13 ACCURACY OF RFP AND RELATED DOCUMENTS

The County assumes no responsibility that the specified technical and background information presented in this RFP, or otherwise distributed or made available during this procurement process, is complete or accurate. Without limiting the generality of the foregoing, the County will not be bound by or be responsible for any explanation or interpretation of the Proposal documents other than those given in writing as an addendum to this RFP.

Should a recipient of this RFP find discrepancies in or omissions from this RFP and related documents, the recipient of this RFP shall immediately notify the Purchasing Contact Person identified in Section 1.11 in writing at the following address: Fulton County Department of Purchasing and Contract Compliance, Public Safety Bldg, 130 Peachtree Street S.W., Suite 1168 Atlanta, GA 30303. A written addendum, if necessary, then will be made available to each recipient of this RFP.

2.14 RESPONSIBILITY OF PROPOSER

Each Proposer is encouraged to conduct all necessary investigations and review all available and relevant data and information, which are necessary in its judgment in order to assume this responsibility prior to the submittal of its Proposal. Proposers are reminded of Fulton County's "**No Contact During Procurement**" policy and shall only contact the person designated by the RFP.

2.15 CONFIDENTIAL INFORMATION

If any Proposal contains technical, financial, or other confidential information that the Proposer believes is exempt from disclosure, the Proposer must clearly label the specific portions sought to be kept confidential and specify on what the exemption is based. The County, at its sole discretion and subject to applicable law, will determine whether such exemption applies. The County has sole discretion to make such determination regarding the disclosure of information, and by responding to this RFP, Proposers waive any challenge to the County's decisions in this regard. Marking all or substantially all of a Proposal as confidential may result in the Proposer being deemed non-responsive to this RFP.

Notwithstanding the foregoing, Proposers recognize and agree that the County, its staff, and its Consultants will not be responsible or liable in any way for any losses that the Proposer may suffer from the disclosure of information or materials to third parties.

2.16 COUNTY RIGHTS AND OPTIONS

This RFP constitutes an invitation to submit Proposals to the County. Without limitation or penalty, the County reserves and holds at its sole discretion, the following rights and options:

- This RFP does not obligate the County to select, procure or contract for any services whatsoever.
- Fulton County reserves the right to award a contract based on this RFP and the proposal(s) received (in whole or in part) to one or several vendors.
- The County reserves the right to change or alter the schedule for any events associated with this procurement and, if required, notify the Proposers. A Proposer, by submitting a Proposal, agrees to be bound by any modifications made by the County
- All costs incurred by a Proposer in connection with responding to this RFP, the evaluation and selection process undertaken in connection with this procurement, and any negotiations with the County will be borne by the

Proposer.

- The County reserves the right to reject all Proposals and components thereof to eliminate all Proposers responding to this RFP from further consideration for this procurement, and to notify such Proposers of the County's determination.
- The County may cancel this RFP without the substitution of another RFP and terminate this procurement at any time without any liability whatsoever.
- The County reserves the right to waive any technicalities or irregularities in the Proposals.
- The County reserves the right to eliminate any Proposer who submits incomplete or inadequate responses or is not responsive to the requirements of this RFP.
- The County may request Proposers to send representatives to the County for interviews and presentations.
- To the extent deemed appropriate by the County, the County may select and enter into discussion and negotiations with the Proposer(s) submitting Proposal(s), which are found to be reasonably susceptible for award.
- The County reserves the right to discontinue negotiations with any selected Proposer.
- The County reserves the right, without prior notice, to supplement, amend, or otherwise modify this RFP.
- All Proposals (other than portions thereof subject to patent or copyright protection) become the property of the County and will not be returned, and the County reserves the right to utilize all such information contained in the Proposals without further cost to the County
- The County may add to or delete from the Project Scope of Work set forth in this RFP.
- Any and all Proposals not received by the Proposal Submission Date shall be rejected and returned unopened.
- Neither the County, its staff, its representatives, nor any of its consultants or attorneys will be liable for any claims or damages resulting from the

solicitation, collection, review, or evaluation of responses to this RFP.

- The County, including its representatives and consultants, reserves the right to visit and examine any of the facilities referenced in any Proposal and to observe and investigate the operations of such facilities.

By responding to this RFP, Proposers acknowledge and consent to the rights and conditions set forth in this RFP.

2.17 COST OF PROPOSAL PREPARATION AND SELECTION PROCESS

Each Proposal, including preparation of all information required to be included in a Proposal pursuant to this RFP, shall be prepared at the sole cost and expense (including, but not limited to, engineering and legal costs) of the Proposer. In addition, the Proposer shall be solely responsible for all costs (including engineering and legal costs) incurred by such Proposer in connection with this selection process, including any costs incurred by the Proposer in any subsequent negotiations entered into in connection with developing the Proposal. There shall be no claims whatsoever against the County, its staff, or its consultants for reimbursement for the costs or expenses (including, but not limited to, engineering and legal costs) incurred during the preparation of the Proposal or other information required by this RFP or procurement process or in connection with the selection process or any negotiations.

2.18 TERMINATION OF NEGOTIATIONS

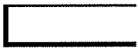
The County at its sole discretion may, at any time, to the extent permitted by Applicable Law, exclude a Proposer from further participation in any negotiation process if the County determines that such Proposer is failing to progress in the negotiations or if the terms of its Proposal are less advantageous than those of other Proposers and such Proposer is deemed to be no longer susceptible of selection. The County will give written notice of its decision to the Proposer, which shall be sent in writing, signed by the County.

2.19 WAGE CLAUSE

Pursuant to 102-391, Each Contractor shall agree that in the performance of the Contract he will comply with all lawful agreements, if any, which the Contractor had made with any association, union, or other entity, with respect to wages, salaries, and working conditions, so as not to cause inconvenience, picketing, or work stoppage.

2.20 ADDITIONAL OR SUPPLEMENTAL INFORMATION

After receipt of the submittals, the County will evaluate the responses, including the references, financial statements, experience and other data relating to the Respondent's qualifications. If requested by the Fulton County Department of Purchasing and Contract Compliance, Respondent's maybe required to submit additional or supplemental information to determine whether the Respondent meets all of the qualification requirements.



2.21 REPORTING RESPONSIBILITIES

The successful Proposer will report directly to the *[Insert name]*, or designated representative.

2.22 GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT

This Request for Proposal is subject to the Georgia Security & Immigration Compliance Act. Pursuant to the Georgia Security & Immigration Compliance Act of 2006, as amended on May 11, 2009, bidders and proposers are notified that all bids/proposals for services that are to be physically performed within the State of Georgia must be accompanied by proof of their registration with and continuing and future participation in the E-Verify program established by the United States Department of Homeland Security. A completed affidavit must be submitted on the top of the bid/proposal at the time of submission, prior to the time for opening bids/proposals. Under state law, the County cannot consider any bid/proposal which does not include a completed affidavit. It is not the intent of this notice to provide detailed information or legal advice concerning the Georgia Security & Immigration Compliance Act. All bidders/proposers intending to do business with the County are responsible for independently apprising themselves and complying with the requirements of that law and its effect on County procurements and their participation in those procurements. For additional information on the E-Verify program or to enroll in the program, go to: <https://e-verify.uscis.gov/enroll>.

See Section 5, Proposal Forms for declarations and affidavits.

2.23 AUTHORIZATION TO TRANSACT BUSINESS

If the Proposer is a Georgia corporation, the corporation, prior to contract execution, shall submit documentary evidence from the Secretary of State that the Corporation is in good standing and that the corporation is authorized to transact business in the State of Georgia.

If the Proposer is a foreign (non-Georgia) corporation, the corporation, prior to contract execution shall submit a Certificate of Authority and documentary evidence from the Georgia Secretary of State of good standing which reflects that the corporation is authorized to do business in the State of Georgia.

2.24 RIGHT TO PROTEST

Any actual bidder or offeror who is aggrieved in connection with the solicitation or award of a contract shall protest in writing to the Director of Purchasing & Contract Compliance. An actual bidder or offeror is defined as a person or entity who has

submitted a bid or proposal on the project for which they are filing a protest. A protest shall be submitted to and received by the Director of Purchasing & Contract Compliance in writing within 14 days after such aggrieved entity known or should have known of the solicitation, the award of contract to another or other acts giving rise to a protest. An oral protest or a protest to an official, employee, User Department, or other person apart from the Director of Purchasing & Contract Compliance does not comply.

2.25 FIRST SOURCE JOBS POLICY

It is the policy of Fulton County Government to provide employment opportunities to the citizens of Fulton County. This policy will apply to all contracts procured through the Department of Purchasing & Contract Compliance valued in excess of \$200,000. The Prime Contract is expected to utilize the First Source Jobs Program to fill 50% of the entry level jobs which arise as a result of any project funded in whole or in part with County funds with residents of Fulton County. Forms are provided in Section 6 of this RFP.

2.26 NON-COLLUSION

By submitting a signed proposal, Offeror certifies that there has been no collusion with any other Offeror. Reasonable grounds for believing Offeror has an interest in more than one proposal will result in rejection of all proposals in which the Offeror has an interest. Any party to collusion may not be considered in future proposals for the same or similar work. See Section 5, Proposal Forms for declarations and affidavits.

2.27 EXCEPTIONS TO THE COUNTY'S CONTRACT

If Offeror takes exception to any term or condition set forth in the Sample Contract, see Section 8 of this RFP, and any of its exhibits, appendices or attachments, said exceptions must be clearly identified in the response to this RFP. Exceptions or modifications to any of the terms and conditions must be submitted as a separate document accompanying the Offeror's proposal clearly marked as "Exceptions."

The County shall be the sole determiner of the acceptability of any exception. See Section 5, Proposal Forms for declarations and affidavits.

2.28 GENERAL REQUIREMENTS

1. Proposals may be withdrawn upon receipt of a written request prior to the stated due date and time. If a firm seeks to withdraw a proposal after the due date and time, the firm must present a notarized statement indicating that an error was made, with an explanation of how it occurred. The withdrawal

request must be accompanied by documentation supporting the claim. Prior to approving or disapproving the request, an opinion will be obtained from Fulton County's Legal Counsel indicating whether the firm is bound by its proposal.

Proposals for projects that are solicited pursuant to the Georgia Local Government Public Works Construction Law (O.C.G.A. § 36-91-1 et seq.) may be withdrawn as follows:

The County must advise Offerors in the request for proposals of the number of days that Offerors will be required to honor their proposals. If an Offeror is not selected within 60 days of opening the proposals, any Offeror that is determined by the governmental entity to be unlikely of being selected for contract award will be released from the proposal.

2. Fulton County shall be the sole judge of the quality and the applicability of all proposals. Design, features, overall quality, local facilities, terms and other pertinent considerations will be taken into account in determining acceptability.
3. The successful Offeror must assume full responsibility for delivery of all goods and services proposed.
4. The successful Offeror must assume full responsibility for replacement of all defective or damaged goods and/or performance of contracted services within thirty (30) days notice by the County of such defect, damage or deficiency.
5. The successful Offeror must assume full responsibility for providing warranty service on all goods, materials, or equipment provided to the County with warranty coverage. Should a vendor be other than the manufacturer, the vendor and not the County is responsible for contacting the manufacturer. The Offeror is solely responsible for arranging for the service to be performed.
6. The successful Offeror shall be responsible for the proper training and certification of personnel used in the performance of the services proposed.
7. The successful Offeror shall not assign, transfer, convey, sublet, or otherwise dispose of any contract resulting from the RFP or of any of its rights, title or interest therein without prior written consent of the Fulton County Board of Commissioners.
8. In case of default by the successful Offeror, Fulton County may procure the articles or services from another source and hold the successful Vendor responsible for any resultant excess cost.

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9. All proposals and bids submitted to Fulton County are subject to the Georgia "Open Records Act", Official Code of Georgia, Annotated (O.C.G.A.) § 50-18-70 et seq.
 10. All proposals and bids submitted to Fulton County involving Utility Contracting are subject to the Georgia law governing licensing of Utility Contractors, O.C.G.A. §43-14-8.2(h).

**SECTION 3
PROPOSAL REQUIREMENTS**

3.1 SUBMISSION REQUIREMENTS

3.1.1 Proposal Submission Date and Submittal Format

All Proposals, including all attachments, must be received by the County in a sealed package no later than Tuesday, September 11, 2012 at 11:00 A.M. and must be addressed to:

**REQUEST FOR PROPOSALS RFP #12RFP84836B-BL
Fulton County Department of Purchasing & Contract Compliance
Public Safety Building
130 Peachtree Street S.W. Suite 1168
Atlanta GA 30303**

The Proposal shall consist of a Technical Proposal, a Cost Proposal and all documents listed on the Required Submittal Checklist (Exhibit 1). The Technical Proposal shall include proposer information, technical information, business-related information, and any Technical Proposal forms requested. The Cost Proposal shall include the Cost Proposal Forms and any information describing the basis for pricing and must be separately, sealed, marked and packaged.

The required content of the Technical Proposal and Cost Proposal is further specified in this section of the RFP. The Proposal must be signed and acknowledged by the Proposer, including certain information to be provided under oath as required under applicable law, in accordance with the instructions herein and the various proposal forms.

THE TECHNICAL PROPOSAL, THE COST PROPOSAL AND CONTRACT COMPLIANCE EXHIBITS SHALL BE SUBMITTED IN SEPARATE, SEALED ENVELOPES OR PACKAGES. THE INCLUSION OF ANY COST INFORMATION IN THE TECHNICAL PROPOSAL MAY RESULT IN SUCH PROPOSAL BEING REJECTED BY THE COUNTY.

Each envelope or package shall be clearly marked as follows:

**REQUEST FOR PROPOSALS RFP
12RFP84836B-BL
Land Records Management System
[Technical or Cost Proposal]
Proposer's Name and Address**

3.1.2 Number of Copies

Proposers shall submit the following:

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1. **Technical Proposal**, one (1) original and five (5) copies on CD media in PDF format in a separately sealed envelope.
 2. **Purchasing Forms Exhibits**, one Original” and one (1) copy in a separately sealed envelope.
 3. **Contract Compliance Exhibits**, one (1) original and one (1) copy in a separate sealed envelope.
 4. **Financial Information**, one (1) original and one (1) copy in a separate sealed envelope.
 5. **Cost Proposal**, one (1) original and one (1) copy in a separate sealed envelope.
 - 5A. **Recommended Options**, in a separately sealed envelope, if applicable

NOTE: DO NOT INCLUDE THE COST PROPOSAL(S) or FINANCIAL INFORMATION ON THE FIVE (5) CD MEDIA PDF COPIES.

All Proposals must be complete with all requested information.

3.2 OVERVIEW OF PROPOSAL REQUIREMENTS

Proposers shall submit Proposals in accordance with the content and format requirements set forth in this RFP. Proposals should be clearly organized and structured in a manner that allows materials included in the document to be located easily.

Each of the instructions set forth in this section must be followed for a Proposal to be deemed responsive to this RFP. In all cases, the County reserves the right to determine, at its sole discretion, whether any aspect of the Proposal meets the requirements set forth in this section. The County reserves the right to reject any Proposal, which in its judgment, does not comply with these Proposal submission requirements.

3.3 SCOPE OF WORK

The scope of this RFP encompasses a full-life cycle project to implement the County's goals and objectives for the Land Records Management System for the Office of the Clerk of Superior Court.

The project scope includes project management, analysis, requirements gathering, gap analysis, design, construction, conversion, interfaces, training, testing, implementation, technical infrastructure upgrades, and post-implementation support.

In addition, package install and customization where necessary, coding/scripting/rules configuration to set up workflow and reference tables, conversion of data and forms templates, coding and testing of the Land Records Management System with operational interfaces, training, communication and organizational change management, setup and support of user acceptance testing, pilot rollouts before full rollouts, assistance with organizational change management, and post-implementation warranty and support. This must be done in coordination with the Clerk of Superior Court office and the County's Department of Information Technology, which supports the network infrastructure, the desktop personal computers and the existing Land Records Management System.

PROJECT OVERVIEW AND REQUIREMENTS

BACKGROUND OF BUSINESS PROCESSES

The Office of the Clerk of the Superior Court of Fulton County (Clerk's Office) is a large, complex operation that lies at the hub of County's justice and land recordation systems. It interacts daily with individual members of the public, the legal and business communities, the Superior Court and to a lesser extent the State Court, and an array of County and State agencies including the Fulton County District Attorney's Office, the Public Defender's Office, the Sheriff, the Office of the Tax Assessor, the Office of the Tax Commissioner, and the Georgia Department of Corrections (DOC), as well as courts and executive branch agencies of other states and counties. The Clerk's Office plays a vital role in enabling these governmental entities to perform their responsibilities and in facilitating the ability of litigants, property owners, and other members of the public to pursue their legal rights and economic endeavors.

Clerk of Superior Court

The process for documents involved in the Lands Records Management process begins in the Clerk of Superior Court, which are deemed the owners of the data. The documents included in the process are deed, liens, and plats which are issued to the Clerk of Superior Court for the purpose of recording, processing, and ultimately storage. Once the documents have been scanned, verified, indexed, and stored, the documents are then made available for use internally and externally to Fulton County.

Internal to Fulton County:

- Environment and Community Development – utilizes plats and deeds to verify ownership and rights of use.
- Tax Assessor – utilizes deed information to update Parcel information and set appraisal value to determine tax calculation.
- Tax Commissioner – request books/pages of delinquent property and create FIFA documents

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- Individuals visiting the Clerk of Superior Court office may utilize desktop computers designated as public inquiry terminals to view information in reference to recorded deeds, liens, and plats.

For a graphical representation of the business processes, see Appendix A.

GOALS AND OBJECTIVE OF THE PROJECT

The office of the Clerk of Superior Court performs a wide range of record keeping, information management and financial management functions in the judicial system. This office also provides court support to each superior court judge. In general, the Clerk's responsibilities as mandated by the Georgia State Code are to:

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- File, record, and index all documents related to real estate and personal property transactions in the county.
 - To file and maintain criminal and civil dockets as well as dockets on domestic suits.
 - To attend to the needs of the court in the performance of the duties of the clerk
 - To keep in the Clerk's office all documents, records, microfilm and dockets and all other things required by the Georgia Codes; and
 - To perform all other duties required by Georgia Law.

Fulton County's vision is to eventually implement an integrated Enterprise Content Management system that will capture, manage, store, preserve, and deliver content and documents related to organizational processes. The Land Records Management System tools and strategies will allow effective management of the county's real estate documents.

INTENDED SCOPE OF DEPLOYMENT

Fulton County is seeking a solution for the use Lands Record Management as it directly relates to the Clerk of Superior Court and the departments which depend on information obtained/exported from the proposed solution. The proposed solution shall be scalable and robust.

SYSTEM REQUIREMENTS

OVERVIEW OF CURRENT SYSTEM

The current Fulton County Land Records application utilizes the Official Records Imaging System (ORIS) which is a customized system that records, receipts, indexes, images and locates real estate documents, vital records, and other documents that are recorded in the office of the Clerk of Superior Court.

The database is Oracle 10g on a Dell Server PE6850 with Microsoft Windows Server 2003 R2 Enterprise Edition SP2. Dell servers are also used for the backup database, Image, web and processing servers as well as controller for the IDS SAN unit.

It is estimated that 2.1 million pages of documents will be processed in 2011 and 3.0 million in 2012.

OVERVIEW OF PROPOSED SYSTEM

Highly scalable and meets the performance needs (handling large volumes of content), of Fulton County Government Clerk of Superior Court office. Components of the suite, should include Content Management), Imaging and Process Management, and Records Management, Business Process Management (integrated workflow engine), Web Content Management as well as bidirectional communication.

ENTERPRISE CONTENT MANAGEMENT (ECM) REQUIREMENTS

This section identifies high-level system requirements:
Repository Services and User Features

- Provide a single logical repository for documents which may be accessed by multiple users in multiple on-site or remote locations. Remote locations are considered locations outside of the Fulton County intranet.
- Employ a multi-tier architecture where each layer of the application architecture (presentation, business logic, and data) can be installed on physically separate servers or in a virtualized environment.
- Allow for scalability by increasing the capacity of existing hardware (vertical scaling) and by increasing the number of servers (horizontal scaling) utilized by the application via physical or virtual means.
- Support a load-balanced architecture such that there may be multiple servers at each tier of the architecture and allow Fulton County to balance requests across multiple servers using common hardware-based and/or software-based load-balancing techniques
- Out of the box integration to any line of business software system without API programming.
- In order to support the content stored for Land Records Management for applications and user interoperability, the system should support the Content Management Interoperability Services (CMIS) v1.0 open specifications found at www.oasis-open.org/committees/cmis/
- System must be standards based (preferably J2EE), and include a robust API set for programmatic integrations to third party systems
- Provide a standard Windows, Windows Explorer "look and feel" user interface for storing, retrieving, deleting and moving documents. Support

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- integration with Windows Explorer, Safari, and Firefox for browsing, search, properties view/edit, retrieval.
- Provide separate libraries or document collections (for different functional areas or groups).
 - Provide the ability to store all object types, including document images (TIFF Group IV), document and desktop files (Microsoft Office, HTML, XML); PDF, JPEG, TXT RTF, photos, video, audio, e-mail (Exchange/Outlook), etc.
 - Handle any documents of any file size (no Limit)
 - System must provide integration to leading middleware applications for scanning and other require functionality
 - System must able to be implemented in and multi-tier architecture and can be supported in a clustered environment
 - Provide document security including redaction.
 - Provide Electronic Filing Module built-in the system with the capability to accept outside vendors documents
 - Provide E-Commerce Module built in the system
 - Provide the ability to disable printing via intranet and internet
 - Provide 6 integrated transactional Kiosk for Public to E-recording, view, print, and pay for transactions
 - Provide the ability to set security at the user and group levels
 - Provide the ability to limit what users can see and do based on security level
 - Provide the ability to support short- and long-term storage repositories
 - Provide the ability to maintain audit log for user changes (e.g. index or document changes, cashier adjustments, etc..)
- Indexing and Search
- Fielded indexing
 - Full-text indexing
 - Provide unlimited indexing capability
 - Provide the ability to customize search interfaces by application and individual user
 - Provide the ability to search repositories from a single search, and deliver a unified results list
 - Provide reporting tools to pull information form the database
 - Provide the ability to support multi-attribute search
 - Provide the ability to do spatial search
 - Ability to integrate with County's email exchange server
 - Ability to integrate with Active Directory and LDAP for user authentication, built in user /group management, or combination of both
 - Ability to handle versioning
 - Provide a broad range of support for database platforms such as Oracle 10g, Oracle 11g, Microsoft SQL Server, IBM DB2 UDB, and Sybase ASE.

IMAGE PROCESSING MANAGEMENT REQUIREMENTS

Will need to operate an infrastructure supporting applications , as opposed to an application unto itself – so it can be leveraged as a shared service that extends wherever imaging is required throughout the Fulton County Clerk of Superior Court Office.

This section summarizes the major imaging technology requirements.

Document Capture, recognition imaging & workflow

- Integrate with the content management repository
- Integrated Business Process management tool for paper-based processes and system application workflows
- Be able to support a wide-range of document types
- Provide the ability to support mixed-volume scanning, including low, medium, and high volumes in a distributed environment
- Provide the ability to handle documents of mixed types, sizes, and conditions
- Provide the ability to manually group or route unacceptable images for rescanning
- Provide image enhancement features
- Provide bulk-import and export capabilities
- Provide the ability to integrate with leading capture systems (please indicate which systems your solution is certified for)
- Proven solutions for Land Records Accounts Payable, Expenses, Distributions and Indexing
- Provide the ability to support numerous indexing fields
- Provide automated data capture (e.g. Zoned optical character recognition/intelligent character recognition [ocr/icr] support for index extraction, barcode recognition, etc.), as well as manual indexing and data entry
- Provide the ability to integrate with legacy systems for retrieval of index information
- Provide the ability to modify existing indexes
- Provide the ability to index according to the standards published via Georgia Superior Court Clerk's Cooperative Authority

Image access and user features

- Provide the ability to support full-text indexing for electronic documents and document images
- Provide the support for image manipulation, including magnify, zoom, rotate, annotate, e-mail and print
- Provide support for redaction of images (to block out areas of text so unauthorized users cannot view those areas)
- Provide the ability to advance forward and backward through multi-page images
- Basic and Advance Image Viewers for enterprise level or department use

E-FORM REQUIREMENTS

This section provides E-forms requirements.

- Provide the ability to map forms to XML schemas
- Provide the ability to capture forms data in a standard format like XML
- Provide the ability to assign lists of valid values for fields, and to enable field validation against defined rules or external tables
- provide the ability to import forms data to a database or line-of-business system
- provide support for auto-entry fields (e.g. date)
- Provide the ability to map forms according to the standards published via Property Records Industry Association and Georgia Superior Court Clerk's Cooperative Authority

BUSINESS PROCESS MANAGEMENT REQUIREMENTS

- Provide the ability to automate structured and repeatable work processes
- Provide the ability to support advanced routing logic within work processes
- Provide the ability to handle adhoc routing
- Provide the ability to route images, documents, or work items based on any available index criteria
- Provide the ability to link workflow processes

ENTERPRISE RECORD MANAGEMENT (ERM) REQUIREMENTS

- Provide the ability to apply retention policies to content based on criteria, such as expiration date, usage, and events particular to the County's business.
- Enables compliance and legal teams to apply litigation or audit holds to content, preventing the accidental or intentional deletion of information organizations are required to retain.
- Ability through to assign retention policies
- Capability of applying retention policy to physical records
- System must provide out of the box, basic document routing for ad-hoc, multi-step routes for approval, review or information
- System must provide workflow for fully customizable pre-canned processes
- Workflow tool must include graphical user interface for creating/deploying workflows
- System must provide graphical admin user interface for monitoring all routes/workflows

WEB CONTENT MANAGEMENT (Publishing) REQUIREMENTS

Allow documents and web pages to be published as Web sites. It enables organizations to maintain accurate, timely, and current Web content with consistent branding and presentation. It provides role-based tools to ensure high-productivity and fast updates to critical content.

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- Must have full functionality through the web interface
 - Content can be authored in content document formats and upon check-in to the WCM will automatically converted to HTML and made part of a fully linked website
 - Integration with systems infrastructure and provide external secure mirrored infrastructure
 - Ability to manage both internal and external website for the delivery of predefined content
 - Ability to search public accessible data with ability to pay for downloads via credit card, PayPal, escrow accounts, etc.

SYSTEMS REQUIREMENTS MATRIX

This section details the functional requirements which are required by the proposed solution. In addition to providing input to aforementioned high-level requirements, the Vendor must also provide a response to the system capabilities in reference to the specific functional requirements as presented in the table below.

Failure to complete and return this section of the RFP will be a basis for disqualification. This section is to be returned on the original hard copy forms provided; in no case shall the requirements be retyped or altered in any way from those provided within. If the forms are retyped or altered in any way then the response will be disqualified. Responses shall also be recorded on the enclosed spreadsheet and returned with the proposal. In the event that the paper response and electronic response differ, the paper response will be used.

This part of the proposal shall include a response to each element. To avoid ambiguity any additional comments or explanation required by the proposer should be identified by element number.

Each item in this response document shall be marked with one of the following "status codes":

[**E**]-Requirement is fully and completely met by proposed system and can be demonstrated in the proposed software package.

[**M**]-Requirement will be provided by proposed modifications to the base software package in the total price proposed. These modifications will be maintained in the base software package in a future release within 6 months of the software package being implemented; and a walk-through of the future release can be provided.

[**P**]-Requirement will be provided by proposed modifications to the base software package in the total price proposed. These modifications can be added with a minor modification to the proposed system and become part of the proposed software package.

[**O**]-Requirement will be provided by a standard option. The cost of these options shall

be provided in the cost section of the proposal.

[**C**]-Requirement will be provided by custom modifications not supported in future releases and the cost indicated separately.

[**X**]-Requirement can not be provided.

In the event that additional information is to be provided on a separate sheet to further describe the method in which the proposed system meets the specific requirement, an asterisk shall be entered on the response form following the "status code", such as [M*].

THIS MATRIX MUST BE COMPLETED ON THE EXCEL SPREEDSHEET THAT IS LABELED "MATRIX RESPONSE" ON THE WEBSITE

No.	Requirement Description	Response E/M/P/O/C/X	Comments
1	Recording/Cashiering/Accounting		
1.1	System must have "Help" procedures available built in to the system. Employees should be able to enter a document type and bring up information on what is needed to record the document. Information on transfer tax and intangible tax should also be available to the cashier. Ability to make changes and/or delete/add procedures to be done by an administrator.		
1.2	The system must be easy for cashiers with basic PC and Microsoft Windows skills to learn and operate.		
1.3	The system must seamlessly integrate cashiering workstations and all required functions.		
1.4	The system must support cashiering operation for all document types received by the Clerk's Office.		
1.5	Cashiering module should allow Operator to capture the name and address of person or firm submitting the document(s). Operator must be able to choose between manually keying the name, and selecting a valid name from a custom table.		
1.6	Cashiering module must require Operator to enter document type and number of pages.		
1.7	When recording a document, Operator must be allowed to either manually key the document type or invoke the document type table for selection of a valid entry. If manually keyed, the document type must be validated against the type table.		
1.8	Operator must be able to manually key in the document name as presented and the table will choose the document type from the table. Operator can accept the system choice or choose a document type from the table.		

1.9	Must provide for a separate document type for real property tax FIFAs and real property tax FIFA cancellations, with a field to index the tax parcel identification number.		
1.10	System must allow as a supervisor/administrator function, the ability to add/delete modify document types and make changes in fees.		
1.11	The system must allow the cashier to suspend a batch so a customer at the window may be assisted then return to the suspended batch to complete the transaction.		
1.12	The cashiering module must reference user-defined table(s) to determine correct calculations for fees and taxes due. Depending on document type, the cashiering module will require the operator to input the number of document pages, number of names and/or other descriptions, which shall be used to automatically determine the correct fee(s).		
1.13	The computed fees and taxes must be displayed on the cashiering workstation. Each fee should be accessible for display.		
1.14	The system must have an option to override (by a supervisor) the calculated fees. System must allow for deferred payments.		
1.15	For transactions not related to the recording process, Operator must be able to conduct a miscellaneous transaction, and enter the full amount at the keyboard.		
1.16	For refund transactions, the system must capture the name of the person or firm who is getting the refund, the amount of the refund, and the reason for the refund. Refund function by a supervisor. System must request remarks to enter reason for a refund.		
1.17	The system must provide a method to list all override reasons or allow text input. The system must store the override reason as part of the transaction audit trail.		

1.18	<p>The system must allow the Operator to record a document that is exempt from taxes and other fees and reset the fee to \$0.00.</p> <ul style="list-style-type: none"> • The actual amount of the consideration must be recorded, but the tax on that amount is recorded as \$0.00 • The actual consideration amount is recorded and captured and the tax will be recorded on that actual amount. 		
1.19	System must be able to accept more than one PT 61 form for a deed.		
1.20	For all fee transactions, the system must create an audit trail that includes the following information: Operator ID, Date, Time, Transaction Detail, Fee Amount, Name of Person or Firm Submitting Document, Instrument Number, Document Type, Fee Type, Payment Type, Check Number, and Book and Page, also must have an audit trail for recordings that are modified.		
1.21	To meet the requirements for commercial account bulk recordings, the system must provide the ability to enter unlimited transactions and document types against one receipt, assigning instrument numbers in sequential order.		
1.22	For recordings, the system must provide the ability to easily duplicate filed entries between different documents		
1.23	The system must be able to automatically assign a unique identification in sequential fashion and automatically assign book and page numbers which conform to the Clerk's Office book and page requirements. This system may be system instrument numbers, bar codes or other. Vendor must consider the volume of Fulton County when proposing an identification system.		
1.24	The system must allow for back dated documents with "A" "B" CFN #s to be added and fall in date order with previously recorded documents.		

1.25	The system must have the ability to print the instrument number, data, and time as well as any other standard recording information, directly onto the documents as a part of the recording process. System must also be capable of imprinting labels for book/page numbers & clerk numbers.		
1.26	The system must generate instrument numbers, which carry the year and whose sequence portion resets each year.		
1.27	The system must automatically capture and save an official partial or completed index during the cashiering/recording/data entry process. This index shall consist of: Recording Date, Unique Time (with seconds), Document type, Instrument Number, Book number, Page Number, and first and second party names. System to use OCR for this process.		
1.28	The system should be capable of configuring the cashiering stations as multi-function stations to facilitate indexing/verifying tasks during periods of low counter volume.		
1.29	The system must carry forward all document indexing data that was both automatically captured and manually entered during the cashiering/recording process into the indexing module without requiring redundant data entry.		
1.30	The system must provide the ability to take any combination of cash payments, credit card payments, check payments or customer draw-down payment for any transaction.		
1.31	If a check is presented for payment, the system must prompt the operator to enter the check number, the check amount and the name of the payer. Checks will be scanned as they are imprinted.		
1.32	The system should provide the ability to take credit card & debt card payments for any transaction.		

1.33	The system must support the processing of missed pages within the same instrument number, for the book and page numbering scheme. System must support later additions of missed pages for a particular document. System must have ability to add documents left out of a file submitted for recording, shift the order of documents, add or delete pages and documents.		
1.34	System must be able to add after recording and provide ability for operator / cashier to cancel and redo a step without the need to void at any point during a transaction until the acceptance, approval and request for receipt.		
1.35	The system must provide the ability for the Operator to accept or reject an entire transaction after all documents and data have been entered on the screen and fees have been calculated.		
1.36	The system must hold the transaction in a suspension and create a rejection letter stating what is needed to record the document		
1.37	The rejection must be tied to a transaction so when corrections are made and submitted again the system can complete the transaction without entering all the data again.		
1.38	If the error is the fault of the filing party, the transaction will be given the file date when it is re-submitted as correct.		
1.39	If the file was rejected by the cashier and it was not faulty, the transaction will be given the original file date and time.		
1.40	Tracking numbers must be in sequence.		
1.41	Rejection process must be part of the cashiering process and not a separate program.		
1.42	Cashiers must be able to search rejection letters that are already processed by the presenter, a date range, or by check numbers of returned checks.		
1.43	System must be able to generate a report of rejections by presenter and by type of rejection.		

1.44	Rejection letters will be assigned a tracking numbers and printed by the cashiers at the cashier work station.		
1.45	Rejection reasons will be in a drop down box with a general field to enter reasons that are not in the drop down box.		
1.46	The supervisor/administrator must have the ability to add new rejection reasons to the program.		
1.47	Documents rejected for intangible tax penalty and interest will have a print out of taxes due over the next 90 days, indicating the date and tax amount will change and the new tax amount.		
1.48	The system should not generate any part of the index, including sequential Instrument Number, the Book and Page number, the unique Date and Time, until the entire transaction has been approved, the money has been taken, and the receipt has been requested.		
1.49	The system must provide the ability to void a transaction after the document has been cashiered. It is desired that this is facilitated through the Administrative interfaces. Void process by a supervisor only.		
1.50	Upon receipt of payment, the system must generate a receipt with date and time recorded, receipt number, Operator ID, instrument numbers, book/page number, detailed list of fees and taxes by instrument number, document type by instrument number, payment types and amounts, submitter name, total dollar amount tendered and total overage amount. Each completed transaction must control the opening of the cash drawer when applicable and generate a receipt. For each book and page recorded the receipt must have a breakdown of each cost. Each receipt will have the employee's identification number.		
1.51	The receipt should be generated by a fast, quiet thermal printer or an impact head device.		

1.52	Imprinting of book and page numbers must be available on all every page number of the document, imprinting directly on the document and also by imprinting on labels.		
1.53	The system must capture and track detailed transaction information that can be used to create and print a detailed Audit Report. This detailed information must be sufficient for use as an additional cash-balancing tool, report distribution tool, or as an investigative tool.		
1.54	The system must provide a computerized method of placing document recorded information such as date, time, instrument number, book and page numbers, recording fee, documentary taxes and name of county on the first page of the document (i.e. Stamp, Bar Code, Labels, etc) NOTE: speed of documents handling must be accounted for in method of affixing this information.		
1.55	The system should be capable of generating a cover sheet for all document types.		
1.56	The system must be capable of handling cash, check, credit card, debit card, PayPal, and draw down/escrow accounts.		
1.57	Cashiering workstations must have the capability of endorsing and scanning checks.		
1.58	The following minimum types of security and audit(s) must be supported for the cashiering module: <ul style="list-style-type: none"> • Sign-on Password Security • Operator ID stored and logged with all transactions 		
1.59	The means by which the system processes the Real Estate Transfer Tax must be approved by the Department of Revenue.		

1.60	The system (cashiering/accounting module) must handle Tax processing and reporting. NOTE: handling of this process must be an integrated module and not require redundant data entry. The system must provide means to distribute (and report) on funds collected for 20 to 50 municipalities and school districts by automatically printing checks or transferring funds electronically. This process must include the ability to issue corrective Tax stamps. Must use GA PT 61 forms and the current millage rates. The system must accommodate multi county and multi-state tax transactions.		
1.61	The system must provide workflow process improvements for the recording of all types of plans.		
1.62	The system should be able to facilitate the Realty Transfer Tax re-determination process.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
2	Cashiering & Reporting		
2.1	All cashiering reports must allow for date and time selection to produce daily, weekly, monthly, quarterly, semi-annual and annual reporting. Time selection is important to allow the County to balance several times per day.		
2.2	The system must provide accurate receipt reporting and match the current fees in the document and fee tables. Exact receipt information that was printed for the customer must also match the receipts that print through the Receipt reporting functions. The detailed receipt information must include, but not be limited to, what portion of each fee was check, cash, or billed to a "draw-down" account. These reporting functions must be available by Operator ID, or consolidated over all cashiering Operators. NOTE: the exact process of implementation may be flexible so long as the core functionality is available.		
2.3	Must generate a report of the date mail out labels are generated, have a feature where data can be entered for the dates documents are mailed back to the filing parties.		
2.4	For each document, the system must generate a receipt with a break down of fees for each document recorded.		
2.5	Must be able to generate a mail out (return label) by entering the Clerk file number in the system		
2.6	The system must generate a Check Report. This report should list all check transactions. The information printed should include, but not be limited to: date, time, Operator ID, check number, check amount, submitter (if captured), and payer (if captured). Totals should print at the end.		
2.7	System must also generate a cash report for each cashier.		

2.8	Must have an internal messaging system, administratively driven, for correspondence between cashiering, indexing, scanning, public inquiry.		
2.9	The system must provide Audit Reporting of changes made after a document is recorded. Audit information includes, but is not limited to: date, time. Operator ID, instrument number, book and page number, receipt number, submitter name, first grantor and first grantee names, document type, number of pages, county recording fees, deed consideration amount, transaction type, payment type, check number, check amount, cash amount, draw-down amount, name of payer, refund amount, name of person receiving refund, and void information. NOTE: Vendor should clearly define the reporting interface and functionality (i.e. Crystal reports, embedded, proprietary or other).		
2.10*	All modifications mandated by new GA state laws or due to requests from GSCCCA must be done at no cost to the County and must be done within 30 days of the request.		
2.11	The audit reporting function must be available by Operator ID, or consolidated over all cashiering Operators.		
2.12	The system must generate a Missing Instrument Number Report. This report should include, but not be limited to: all voided transactions, along with Operator ID, date and time.		
2.13	The system must be capable of producing a Void Report. This report should include, but not be limited to: date, time, Operator ID, instrument number, book and page numbers, and other transaction details. This report should be available by Operator ID, or consolidated over all cashiering operators.		

2.14	The system must provide a Cash Balancing Report. This report(s) should be available in summary and detail format. This report must include, but not be limited to: totals for recording fees, totals for transfer taxes, totals for each document type, totals for each payment type, totals for each transaction type, totals for each account type, back deposit amount, and total number of transactions. This report must be available by Operator ID or consolidated for all cashing Operators.		
2.15	The Cash Balancing Report function must provide detailed report(s) by Operator ID that include, but are not limited to: date and time, instrument number, book and page number, receipt number, submitter name, document type, number of pages, recording fees, consideration amount, transfer tax, transaction type, payment type, check number, check amount, cash amount, draw-down amount, and deposit amount.		
2.16	The system must provide Summary Reporting capabilities. The Summary Reports must include total number of documents recorded in a given date range. Total must be broken down by document type. Total deed consideration amount for the date range should print as well. Reports must also have a breakdown of fees collected for various agencies.		
2.17	The system must provide workflow process improvements for the reporting and cashing of all types of plans as indicated in Appendix E.		
2.18	System must generate a report of all work produce by each employee. Reports for employees must be by the number of documents filed, the number of pages filed, the number of rejections processed.		
2.19	The system should provide means for ad hoc reporting and any data/statistics captured as part of the system processes. System must provide a report of work completed in cashing and in indexing and verifying.		

2.20	Report should list number of documents recorded, number of pages recorded, number of key strokes and number of rejections processed.		
2.21	The system must provide Accounts Receivable and Accounts Payable functions.		
2.22	Grantor notification via USPS or electronic transmission for all various documents of conveyance.		
2.23	The System must have built-in Fraud Registration that contact the grantor via email, printed notice, and/or SMS text once a instruments is recorded against their property		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
3		Scanning	
3.1	The system must support scanning of an individual document and large volumes of batch scanning(750+ pages) of subsequent indexing from multiple workstations.		
3.2	System must be capable of producing 16mm and 35 mm micro-film from TIFF or PDF images that were e-filed and micro-film paper filings from scanned images.		
3.3	Reports to be generated for each employee on number of pages and number of documents scanned.		
3.4	System shall mark each image with the book and page number at the bottom of each page, creating space as needed.		
3.5	The system must automatically link document image(s) to the corresponding partial index.		
3.6	The system must support batch scanning (750+pages) for subsequent indexing at multiple workstation		
3.7	System must include back scanning of all indices and images prior to 1980. <ul style="list-style-type: none"> 190,000 index page images 800,000 deed page images 25,500 plat and condo plat images 5,600 condo floor plan pages 		
3.8	System must provide for the scanning of plats and using the scanned image to make 35 mm film of scanned plats on site. System to use archive writer to create 16 mm microfilm of documents (other than plats /floor plans). System must allow electronic submission of plats		

3.9	System shall provide for the scanning and indexing of all tax assessor field books. 90,000 tax assessor field book images.	
3.10	System must have the ability to redact information.	
3.11	System should be capable of OCR (optical character recognition) to locate information for the purpose of redaction. Redaction function should be available at indexing, verifying and scanning steps.	
3.12	Items will move through to the indexing verification phase in the same manner as new filings. Reports of back dated documents filed in this manner will be generated.	
3.13	System must validate the number of pages scanned against the manually entered document page count and provide means for correction as required.	
3.14	The system must provide some means of image sharpening to remove specks as well as adjust resolution.	
3.15	Scanned images should be available for printing as soon as they are scanned and burned, before indexing and verifying.	
3.16	The system must provide a detailed method for validating and correcting inconsistencies between scanned page count and manually entered page counts.	
3.17	The system must allow a multi-page document to be recorded under a single document index.	
3.18	The system must allow appending and insertion of additional pages to existing documents. These new insertions would be missing pages within a book and page numbering scheme.	
3.19	The system must permit appending, insertion and deletion of pages to previously scanned documents without requiring the entire document to be re-scanned.	
3.20	The system should employ industry standard scanners.	
3.21	The system must support the scanning and viewing of all documents sizes currently in use in the Clerk's Office.	

3.22	The system must support the various paper weights and qualities as currently in use in the Clerk's Office.		
3.23	The system must support both simplex and duplex scanning.		
3.24	Ability to scan a mixture of simplex and duplex without having to take the duplex pages out and scan them separately.		
3.25	The system must support the use of bar codes for system scanning. NOTE: County recording transaction volumes must be accounted for in systems design and implementation.		
3.26	The system architecture and workflow processes must be easily scalable and flexible to allow for "fine tuning" of the process post-deployment.		
3.27	Scanning Stations proposed as part of the system must be easily operated with basic PC skills and little or no prior imaging experience.		
3.28	The system must employ leading industry standards for digital image storage. This storage must be scalable, very reliable and manageable.		
3.29	The system must provide means for copying a specific range of instruments numbers and related data (including index and digital images) to CD ROM or equivalent means to distribution outside the Clerk's Office.		
3.30	The system should allow, if desired, the document to be scanned the same time money is transferred for the initial recording. (i.e. at the cashiers counter)		
3.31	The system should allow, if desired, the document to be scanned at the time of indexing.		
3.32	The system must provide workflow process improvements for the scanning of all types of floor plans or plats.		
3.33	The system should facilitate the scanning and retrieval of UCC documents.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
4	Indexing/Proofing/Verification		
4.1	Indexing station must be easy to use with minimal Windows Operation system experience.		
4.2	System must be capable of split screen viewing with the document on one side and indexing fields on the other side. Screen settings to be customized by the user. Customization to include font size, colors, and locations of the fields. By user log in, not by location.		
4.3	The system must provide a flexible means to retrieve documents from the workflow queue that are ready for indexing and/or verification. The system should allow for any, but not be limited to, the following information to be used for queue retrieval: Instrument number, book and page number, document type, document status (i.e. unverified)		
4.4	Must have the standard features of zoom, rubber band, magnifying glass, rotate, page navigation, page back and forth, document back and forth, by mouse and hot key navigation.		
4.5	The system must display all partial index information for each document and prompt the Operator for the additional indexing fields relevant to that document type.		
4.6	Display screen must prompt by highlighting required fields needed to index certain document types. Mark certain fields required in each process. Alert employee of fields that must be completed before moving to the next field.		
4.7	Edit and corrections- for documents filed prior to year 2000 indexing / verifying must be able to change document type as a supervisor function.		
4.8	Must be able to index alpha numeric district numbers and land lot numbers, must be able to index alpha-numeric and numeric-alpha (index as presented by the filing party)		

4.9	<p>Must also have a field to index section numbers for the first and second districts.</p> <p>EX 1st district, 1st section 1st district 2nd section 2nd district 1st section 2nd district 2nd section</p> <p>Must have separate fields for district # , section #, land lot #, block letter or #, lot letter or #, phase letter or #, unit letter or #, subdivision/condo name, street address , general info.</p>		
4.10	System must have automated indexing (OCR) capability		
4.11	County must be capable of designating sealed document types in the system. System must automatically seal any document that is entered and recorded as a document that is classified as sealed. Without the clerk taking additional action to seal the document.		
4.12	The system must allow frequently-used names to be retrieved from user-defined tables, as well as manually keyed.		

4.13	<p>The only characters to be entered are:</p> <p><u>Character</u></p> <p>Space</p> <p>!</p> <p>#</p> <p>\$</p> <p>%</p> <p>&</p> <p>*</p> <p>,</p> <p>/</p> <p>0 through 9 (Arabic numerals)</p> <p>A through Z (alphabetic letters)</p> <p>&</p> <p>/</p>	<p><u>Usage</u></p> <p>use in any name</p> <p>single spaces only</p> <p>use in business names</p> <p>use in any name</p> <p>use only to separate human surnames from given names otherwise ignore</p> <p>See table in N2-12 for usage</p> <p>use in any name</p> <p>use in any name</p> <p>precede and follow by a space when between characters and words or words and words</p> <p>do not precede or follow by a space when between characters not amounting to words</p> <p>index for fractions and dates within names</p>	
4.14	<p>Reports to be generated on changes & corrections made to the indexed data.</p>		
4.15	<p>Reports to be made in the indexed and verifying programs as to what was originally keyed as what was changed in verification.</p>		

4.16	Reports also made of data changed after it was released to public inquiry. The identification number of the indexer and verifier who entered the data must always be available to a supervisor/administrator		
4.17	Ability to view and/or print any related reports as needed as in tracking and audit.		
4.18	The system must provide workflow process improvements for the indexing, proofing and verification of all types of floor plans and plats.		
4.19	The header of each page of the Index reports should print the filter and sort order in place for that specific report compilation. The report should use a cover page with name of county, filter options, sort order in place for the specific report and date printed.		
4.20	System must have an audit trail so a supervisor can tell the name of the employee who indexed and verified each document. System must be capable of generating a report that list the number of documents keyed by each employee. Must also produce reports on the number of key strokes of each employee, the number grantors or grantees, the number of cross reference entries, the number of legal descriptions.		
4.21	The system must provide for basic Windows based application functionality including: <ul style="list-style-type: none"> • Support for hot key switching between opened module, screens and application • Drop down or pop up interfaces for all table driven data entry points in all modules • Support for hot key switching between opened module, screens and application • Drop down or pop up interfaces for all table driven data entry points in all modules 		
4.22	The system must automatically set the document status flag (or equivalent) from "unverified" to "verified" (or equivalent) when verification process has been completed.		

4.23	Ability to release documents to public inquiry immediately when verified without waiting for the instruments to release in exact CFN order.		
4.24	The system must be capable of generating a Verification Report according to specified date and time range or other criteria.		
4.25	The system (specifically, workflow process) must maintain a consistent set of rules and processing commands between indexing and verification modules. This includes all editing controls as well as field duplication controls. Vendor should describe in detail the proposed workflow verification processes.		
4.26	Supervisor must be able to return a document that was directed to verification back to the original the indexer for corrections.		
4.27	Copy & paste names from one field to the next.		
4.28	Copy all names from grantor to grantee and back and forth as requested.		
4.29	Create a County generated drop down menu in the document legal field for subdivisions.		
4.30	Import – Allow employee to type out grantor/grantee names in a note pad file and import copy/paste into index fields.		
4.31	The system must update the Last Date changed field (or equivalent) for a document index upon any change to a verified document.		

4.32	<p>If corrections must be made to the data, after the correction is made, the system will put the date and time of the correction in a manner so it can be viewed on the index screen in public inquiry. System will note on public inquiry exactly what was added as a correction to the index. Data that was incorrectly entered will not be deleted. All comments added on a correction must be displayed in public inquiry. Ability to make any and all changes needed in the index/verify program to release a document to public inquiry.</p>		
4.33	<p>The capability to verify any place...5 names indexed 13452 verified 12345 – system compare data, not placement and flag correct. . EX: Index -3 grantors – Smith, Jones, Brown, Verify - Smith, Brown, Jones They are not in the same order, but the data is the same. Or index Williams, Edwards, Coffelt and omit the name Clark Then verify Clark, Williams, Edwards, Coffelt They are not in the same order, but the data is the same.</p>		
4.34	<p>Cross reference of related documents – when indexing the book and page number of related documents, the system must automatically relate the book and page number of the original document to the new document. The system should electronically stamp the book and page number of the new link on the first page of the image of the original document.</p>		
4.35	<p>System must have a training program for new indexing employees with information on tabs at the top of the display screen with training and instruction. Ability for the County to create customized help screens for training purposes.</p>		

4.36	Verification employee must have the ability to view at least 70 character indexed to compare indexed to verified documents.		
4.37	Capability to assign certain documents types for the purpose of training. Filter documents base on the training level of the employee. Documents to be held in a queue and routed to a designated trainer or supervisor of evaluation and/or verification.		
4.38	When changes/corrections are made the system will flag the change and hold in a queue for review and release by a supervisor.		
4.39	System will automatically assign the date & time the entry was added, modified, corrected and this information will be viewed on the index in public inquiry.		
4.40	System must be capable of allowing the re-recording of documents that did not convert in years prior to year 2000. System must allow the recording with the original file date; manually assign the document type, book, page number and filing date and time. Fees are not required.		
4.41	Items will move through to the indexing verification phase in the same manner as new filings. Reports of back dated documents filed in this manner will be generated.		
4.42	The system must be able to display the scanned image and the index screen on the monitor in separate windows that the user can re-size as desired and easily switch between.		
4.43	The system should ensure that the separate windows used throughout the application are designed with user-friendliness in mind. Specifically, individual windows of the system should not open on top of a previous window in such fashion that the user (Operator) must manually reposition the window to continue document recording.		
4.44	System must follow GSCCCA Indexing standards and transmit to GSCCCA electronically		

4.45	The capability to hold complete (verified documents) in queue to be released (transmitted) at will to GSCCCA without added steps of building. (Very important function, this is tied into funding)		
4.46	System must allow an option to alert the employee to review such entries that start with The, A, Estate, Trustee, Sheriff.		
No.	Requirement Description	Response E/M/P/O/C/X	Comments
5	Public Access and General Document Retrieval		
5.1	Index search functions must be simple for the general public to use, without needing additional training beyond the initial training period as conducted as part of the initial deployment of the new system.		
5.2	Font size no smaller than a 12 for index data. Images of documents to be displayed at least 85% size for all images except plats.		
5.3	At the top of the screen, the name/names the user submitted for research must be displayed, so the user can review and double check his request as he reviews the index. Customer shall the capability to log in and customize search options. Ability to print a history of the search done by the person performing the research, option to search by each year, by legal description, by document type, etc..		
5.4	Data detail to be displayed only at the request of user.		
5.5	Systems should have the functionality that will allow public to electronically fax and email after fees are collected		
5.6	Vendor shall provide (6) touch screen transactional kiosks with 20" or higher displays that gives the public the ability of the print documents, view documents, accept credit/debit cards, use existing draw down accounts, and e-file/record documents		

5.7	Public access stations must allow the public to log on with username and password to deduct fees incurred from document printing or e-faxing from a draw-down account. They should also allow payment via debit type card or PIN pad when customers are receiving copies from the back area printers. Prints are to be held in queue and not released until payment is finalized.		
5.8	Internal one way messaging should be available to public users who are logged on to a workstation, so the user can easily and quickly communicate to the County staff about errors found in the public records. EX: User can advise staff of an alleged index error; An automatic response will be displayed.		
5.9	System must have an option to sort by a single year by exact filing date and time or sort multiple years by exact filing date and time but default search will be as described in elsewhere.		
5.10	The system must provide the public with full featured and complete index search functions for use in public retrieval of specified documents.		
5.11	Public inquiry should be able to display all data indexed for each search type. Ex: if the document has a book and page reference and a legal description, both will be displayed whether the search is by book and page # or by name search.		
5.12	The system must provide capability to search names by a combination of last and first names. (not only Walker, but also Walker Robert and Walker R)		
5.13	System can search with or without a comma after the last name, compress. Delete, strip spaces, strip commas and periods.		

5.14	<p>The system must support searches for any of the following index search arguments:</p> <ul style="list-style-type: none"> • Name of Party (grantor and/or grantee) • Two Party Name Search • Name of Company • Document/instrument type • Book type • Book & Page Search • Legal description by district #, and /or section # & land lot # • Block/pod and Lot Search (alpha & numeric) • Unit • Phase • Tax parcel ID # - (for real property tax FIFAs) • Recording date range search • Street address or just street name without a street number • Subdivision name • Condo name 		
5.15	Must be able to search land district 1 and land district 2 with and without a section number.		

5.16	<p>System shall have a search in which a name and at least 8 variations of the name can be entered and an index retrieved that is sorted by land district number, land lot number, block number or letter, lot number or letter, unit number and/or subdivision name. EX: Search the following name variations: John Wieland Homes John Weiland Homes Wieland John Homes Weiland John Homes</p> <p>Or search: Sheppard John Sheppard J Sheppard Johnny Shepard John Shepard John Shepperd J Shepperd Jon Shepperd Jonny</p>		
5.17	<p>System shall have a search option to roll year by year at the users request, by grantor, grantee or both grantor & grantee. Roll years forward and backward.</p>		
5.18	<p>System must support searches containing any combination of the following index search filters: following index search filters:</p> <ul style="list-style-type: none"> From/To Range for Recording Dates, or all (Default should be "all") One Document Type selection, or all (Default should be "all") 		
5.19	<p>For index fields that are supported by a user-maintained table (such as document type, and party type), system must allow user to invoke a display of valid table values to assist in defining the search filters.</p>		

5.20	<p>User must be able to sort data by any field.</p> <ul style="list-style-type: none"> Sort by alpha numeric legal descriptions in the following order district #, land lot #, lot #, block # or letter, unit #, phase #, pod #, By book & page reference # By street address By parcel ID # (for real property tax fifas) By filing date & time 		
5.21	<p>System must search records by entering a date range and then displaying each calendar year</p> <ul style="list-style-type: none"> Ex: gtor 1990 then go to 1991 then 1992 and so on, system will "roll through" each year & sort data in an alpha numeric display with out using xx/xx/xxx, user must be able to enter just the years 1980-1981-1982 ect up through the current year. 	<input type="checkbox"/>	
5.22	<p>System shall have a default index that displays as follows: Gtor-Gtree -doc type-date-time-dist-LL#-bockl-lot-address or sub name Book/page #, if the subdivision name and book/page reference are both available, the book and page # will be viewed, (clerk file # is not necessary on the index page)</p>		<input type="checkbox"/>

5.23

The system must be capable of producing reports for any documents that have been fully or partially indexed. These Printable Index Reports must be viewable and printable by:

- Recording date/time range
- Direct and indirect party names
- Book and Page number
- Deed consideration (data from transfer tax module in recording)
- Loan amount (data from intangible tax calculation in recording module)
- Block and Lot
- Unit
- Phase
- Document type
- Street address, (if indexed)
- Tax parcel ID #
- Subdivision name
- Block and Lot
- Unit
- Phase

5.24	<p>The index page on the public inquiry must be sorted as follows from left to right for each filed:</p> <ol style="list-style-type: none"> 1. grantor or grantee 2. grantor or grantee 3. type of instrument 4. date 5. time 6. district # 7. section # (if applicable) 8. land lot 9. block or pod (alpha or numeric) 10. lot (alpha and/or numeric) 11. book and page reference field 12. address or subdivision/condo name <p>The Clerk ID number/file number does not need to be displayed. The system must sort data as follows, 1st – if there is a book and page number reference, this filed is displayed in numeric order of the book/page numbers (see #11 above) 2nd - by district number (alpha and/or numeric) 3rd – by land lot number (alpha and/or numeric) 4th - block or pod (alpha or numeric) 5th - lot (alpha and/or numeric)</p>		
5.25	<p>Must accommodate alpha-numeric district and land lot numbers and numeric-alpha district and land lot number and strip / delete spaces.</p>		

5.26	<p>Able to compress, delete, strip commas and spaces. EX district # 14 F, 14 FF, 9 C, 9 F</p> <p>When searching 14 F, system should also search: 14F 14 F 14 FF 14F F 14 F F</p> <p>When searching the 9th district, the system should also search: 9F 9 F 9C 9 C</p> <p>When searching the 8th district, the system should also search 8 8 C 8C</p>	
5.27	System must support the ability to abort a search at any time.	

5.28	<p>Should provide for a "general public search or quick easy search" so a citizen can easily access information with a list of questions such as:</p> <p>What do you want to do? I need a copy of the deed to my house. The person would type in his name and bring up only the grantee index with WDs, QCDs, Estate deeds, etc.</p> <p>I need to see if there are liens filed against me. The person would type in his name and bring up only the lien records and lien cancellation records.</p> <p>I need a copy of the document that shows my house is paid for. System would bring up security deed cancellations.</p> <p>Clerk's staff will provide the list of what is needed for each search.</p>		
5.29	System must provide a query results screen that lists index records resulting from a query. Users should be able to retrieve expanded information about the index record.		
5.30	For each index, on a retrieved list of index records, system must display a comment stating, "See document detail".		
5.31	System must provide the ability for a user to select from the retrieved list of index records one document at a time for full image display.		
5.32	System must provide the ability for a user to return to index reference screen without viewing all selected documents.		
5.33	System should provide the ability for a user to select from the retrieved list of index records more than one document for image display. (multi-selection of records)		

5.34	System should provide the ability for a user to scroll between the images of selected documents without returning to the index reference screen.		
5.35	System must provide the ability for a user to return to the index reference screen without viewing all selected documents.		
5.36	System must support the display of multiple Grantor/Grantee names in alphabetical order.		
5.37	System must support the following movements through an image display: page-by-page, forward and backward, selecting a specific page for viewing, jump to first or last page. Document by document, forward and backward.		
5.38	System must support the retrieval of a document by multiple users at the same time.		
5.39	System must support the ability to ensure that "secured" documents cannot be accessed by the public, or by any member of internal staff, without the proper system security rights. (e.g. Military Discharge records)		
5.40	System must support full-size display of 8.5" x 11" documents.		
5.41	System must support scaled full image display of 8.5" x 14" or larger documents.		
5.42	System should provide minimum display resolution of 200 dpi or better.		
5.43	System must provide the following image manipulation functions: zooming in and out, panning back and forth, scrolling, rotating, flipping and rubber banding.		
5.44	System must meet the following index retrieval performance requirement: results of a simple index query must return from a search within 10 seconds.		
5.45	Vendors should indicate image display performance in "Comments"		

5.46	The system must provide for POS with the print request tied to the cash register in the back. EX When a print is requested, the amount that shows for the customer must be reflected when the cashier pulls up the request to print it.		
5.47	The system must allow for different fees for different print request. Large plats \$2.00 etc. certified copies \$2.00 for certification and .50 per copy.		

5.48

The default search must be as follows:
1. The index should be displayed immediately after request without an intermediate screen.
2. It must be sorted for a single year or for multiple years as follows, from left to right

- party name (grantor or grantee)
- party name (grantor or grantee)
- document type
- number of pages

****THEN SORT THE DATA AS FOLLOWS IN NUMBERS 1 THROUGH 6

1st cross reference for the book and page numbers of related documents

2nd district number (including alpha numeric or numeric alpha)

3rd section number (if applicable)

4th land lot number (including alpha numeric or numeric alpha)

5th block number or letter (including alpha numeric or numeric alpha)

6th lot number or letter (including alpha numeric or numeric alpha)

miscellaneous street names, subdivision names
file/record date/time
book/page #

The default search will not be sorted in exact date and time. It will be sorted as follows.
The data must be sorted as follows:
First sort will begin with the cross reference field. The book and page number must be sorted in numeric order.
Second sort will be in numeric order by district number.
The district numbers in Fulton County are:
1-7
8 aka 8C if the user enters either 8 or 8C, the system will search all variations in one request
9 aka 9F or 9 F or 9C, or 9 C, the system will search all variations in one request

13
14
14F or 14 F or 14FF or 14 FF or 14 F F the system will

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5.49	<p>When a search is requested, the index will be displayed as described above (5.46) with any intermediate steps.</p> <p>party name (grantor or grantee)</p> <p>party name (grantor or grantee)</p> <p>document type</p> <p>number of pages</p> <p>cross reference for the book and page numbers of related documents</p> <p>district number (including alpha numeric or numeric alpha)</p> <p>section number (if applicable)</p> <p>land lot number (including alpha numeric or numeric alpha)</p> <p>block number or letter (including alpha numeric or numeric alpha)</p> <p>lot number or letter (including alpha numeric or numeric alpha)</p> <p>miscellaneous street names, subdivision names,</p> <p>file/record date/time</p> <p>book/page #</p> <p>Hot keys must be available for document data details, to pull up an image, to go to next page or previous page, next document or previous document, or to request a copy of an image or to request a copy of an entire document, also a hot key to return to the search screen.</p> <p>After retrieving an image, the image must take up most of the page and be at 85% of the original size. The only other information needed on the display along with the image is:</p> <p>Zoom menu and options to view - the transfer tax form, the previous page, the next page, the previous document, the next document, print current image, print document, print transfer tax form, print index page, and option to exit or return to the index page.</p> <p>User must be able to sort in exact filing date and time as an option only, not as the default search.</p> <p>When searching property tax fifas and related,</p>	12RRFP84836B-BL, Land Records Management System]
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No.	Requirement Description	Response E/M/P/O/C/X	Comments
6		Printing	
6.1	<p>System must provide print functions that include:</p> <ul style="list-style-type: none"> • Printing of entire document and all of its pages • Printing of retrieved index list • Printing of selected document pages • Screen print of current screen • Print full size plat copies on the floor at public printers, "rubber band" a lot and print the rubber banded area, ability to print various size plats on the floor, print a document or part of a plat and print only the selected part of an image. Printing can be directed to the printers on the floor or to the back for printing by the employees. 		
6.2	Must be capable of generating a paper index.		
6.3	Frequent customers to have draw down/prepaid debit accounts. System must be capable of using a debit card system for prepaid accounts and/or account numbers. Prints are not to be released until payment is finalized.		
6.4	When viewing each images customer can mark the image/page for printing, without having to enter the page number.		
6.5	Ability to request certified copies for printing. System will print the text necessary for a certified copy, Clerk will only need to sign the document and place the Court seal.		
6.6	System must provide the ability to print all the imaged pages of a document without looking at each document page.		
6.7	System must provide the ability to queue prints to specific printers and the ability to specify default printers.		
6.8	System should meet the following print performance requirement: printer should print the image at the rated speed of the printer.		

6.9	The system should allow for print requests to be stored in a queue for a specified period of time. (i.e. shopping cart basket)		
6.10	The print services subsystem must be capable of supporting current industry standard printers such as Hewlett Packard and Lexmark laser printers.		
6.11	Printers must be individually addressable by the users as defined by the system administrator. Not all printers within the printing subsystem are to be available to all users unless allowed by the system administrator.		
6.12	System should provide the ability to print 8.5" x 11" and 8.5" x 14" and 11" x 17" copies. All prints sizes should be available on the floor to customers using the POS system.		
6.13	The system should provide "quick reference" cards attached or near each public workstation. With the exception of initial system training, operators of the public workstations should not require to interface with the Recorder staff.		
6.14	The system must ensure that the public workstations have access to a local high speed printer. (Operators of the public workstation should not be required to interface with the Recorder staff to retrieve printed documents that are available through the system as digital images).		
6.15	The system should be able to print to a wide format printer for all full size plats and floor plans documents.		
6.16	Printing of plat and condo floor plan documents should function in a consistent manner with other documents.		
6.17	The system must print out a receipt with each printed document or group of printed documents at the customer request. Customer can request a receipt for the entire day or whenever requested.		
6.18	The information printed on this receipt must be capable of being corrected by the system administrator.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
7		Data Archiving	
7.1	The system must have the ability to download images to CDROM in addition to transferring to a network drive for film creation purposes. This must include archiving of plats and floor plans on 35 mm film using an on site Archiver writer.		
7.2	Must be capable of creating microfilm for e-filings without scanning paper copies of the documents.		
7.3	16 mm film to be created on site using an archive writer.		
7.4	35 mm film to be created on site for plats and floor plans		
7.5	System must have archiving/extracting module		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
8		Internet	
8.1	The system must maintain all current internet capabilities and integrate with the a plan scanning system through 2004 – See Appendices		
8.2	The system should provide for new revenue generating services via the Internet including image viewing.		
8.3	The system should provide for the printing of Internet images for a fee.		
8.4	The system should provide so images with a watermark diagonally across it and have the capability to lock printing unless a fee is collected.		
8.5	The system shall provide the ability of processing payments online including credit cards, and draw-down accounts via secure username and password authentication.		
8.6	The system must ensure that data available via the Internet is secure and separate from the rest of the internal system. Specifically, system architecture and final configuration must provide protection of data from Internet access.		
8.7	Vendor should clearly identify current capabilities and future directions to support e-Recording.		
8.8	The system should allow for print requests to be stored in a queue for a specified period of time. (i.e. shopping cart basket)		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
9			
9.1	Desktop stations should be Microsoft Windows 7 or MAC OS 10.5 or latest Operating Systems for workstations with adequate system resources required for the efficient processing of all system application components running on the desktop.	Desktop Stations	
9.2	The system workstations should be developed using imaging standards to ensure that all workstations of a particular function are configured identically and be supported in an efficient manner.		
9.3	The system workstations monitors must be large and capable of displaying all resolutions required by the system. Vendors may propose space saving designs as appropriate.		

No.	Requirement Description	Response E/M/P/O/G/X	Comments
10*		E-Filing	
10.1	The system shall provide means to record documents electronically. This functionality will be deployed in phases as the standards and level of acceptance in the recording industry increase. Initially, this may be implemented for, but not limited to, a single transaction type – e.g. a satisfaction from an out of state lending institution. Vendors that do not have this capability may identify 3rd party partners as defined previously in this document.		
10.2	Accept e-filings from County approved submitters (trusted parties) following PRIA guidelines		
10.3	Accept e filings from all approved submitters using PRIA compliant software.		
10.4	E filing system should have the same capabilities as paper filings, customer tables, rejection letters, etc.		
10.5	System must be able to give the filing date and time based on the actual date/time the document is accepted by the Clerk.		
10.6	System must alert the cashier/recorder of e-filings in the queue. Must alert with the submitters identification and the number of filings in the queue. E filings to be sent to designated employees.		
10.7	System must be capable of electronic filing in tier 1, tier 2, & tier 3 as defined by the Uniform Electronic Transaction Act (UETA) and as defined by the Uniform Real Property Electronic Recording Act (URPERA)		
10.8	Electronic recording payments to be guaranteed by a third party approved by written agreement with the Clerk of Superior Court. EX. Pay Pal or ACH.		
10.9	Images E-filed must be imprinted with the book and pages numbers on the first page of the document or have the option to imprint the book and page number on each page.		

10.10	If the document e-filed is only imprinted on the first page, when a copy is requested on public inquiry, all pages will be numbered.		
10.11	Must accommodate customers' use of different e-filing systems compliant with PRIA.		
10.12	System must be able to give the filing date and time based on the actual date/time the document is accepted by the Clerk.		
10.13	Must accommodate filing parties who chose to e-file using the GSCCCA portal. Must have an API to the GSCCCA portal.		
10.14	System must have an automated indexing (OCR) module for e-filed documents; this must be integrated/linked to the indexing/verification component.		
10.15	System must have the capability to designate certain cashiers/work stations for the acceptance of e filings.		
10.16	E-filed documents rejected will have the filing date/time when they are returned in recordable form. If the error is made by the Clerk's Office staff, the filing date given will be the filing/date time it would have been recorded.		
10.17	A supervisor can manually assign a filing date and time and or a book and page number.		
10.18	Clerk can manually assign a filing/date and time (supervision function)		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
11			
11.1	The system must be compatible with the County network infrastructure.		
11.2	Vendors must identify all network and telecommunications infrastructure requirements		
11.3	Vendor must design system to work in a virtual environment as well as physical servers		
11.4	Vendor system must be certified by GSCCCA 30 days prior to go-live date		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
12	Business Continuation		
12.1	System must provide the ability for full backup and recovery in the case of any type of malfunction (hardware and/or software).		
12.2	The system must provide backups for images and index data, and allow the System Administrator to control and adjust backup procedures.		
12.3	System must keep image and index databases on-line indefinitely.		
12.4	Vendor must supply their backup procedures and policies as part of this proposal.		
12.5	Must provide a detailed listing of names, addresses, phone numbers and email addresses of key contact personnel		
12.6	Vendor may provide estimate for hot site, warm site and off site data backup options as part of business continuance plan.		
12.7	The system must be architected in such a fashion so as to allow for the recording of documents during a partial outage of the final data repository (database). This may be local cache directory of the recording machine or other. Vendors should specify how periodic interruptions in network connectivity and/or partial power outages will affect system workflow processing.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
13	Administration/Security/Other		
13.1	System must provide a comprehensive administration and security system including, but not limited to: role based security schema, administrative override of information with a "sealed" status, completed auditing features for all recording, indexing, proofing and verification processes including public workstation by user ID or account.		
13.2	The system must also provide auditing and reporting capabilities on all functionalities (internet, transactions, printing, e-filing, data extraction, etc...)		
13.3	The system security schema should be desired as a hierarchical system that allows a specific Operator role to view only those allowed functions.		
13.4	The system should have the ability to monitor workflow queues and generate historical reports by date and time range, operator or other criteria.		
13.5	Application source code: Should the vendor/contractor cease to be in business or if any proceeding in bankruptcy, insolvency, or receivership, whether voluntary or involuntary, is initiated by or against the Vendor/Contractor, a copy of the source code will be provided to the Recorder's office at no charge. During the term of the contract of the selected vendor, a copy of the source should be maintained with a third party escrow agent, who would be responsible for delivering the source code to the Office as provided for above. The source MUST be kept current with each update to the system.		
13.6	The system must have the capacity to process 3 million pages plus 20% annual growth for 10 years beyond implementation date.		
13.7	The vendor of the system must certify that it has complete and exclusive ownership of all application code for all modules proposed.		

13.8	The system must provide periodic updates and patches to the system and peripheral components as required.		
13.9	The system must be secure to only allow information to be sent from the system via ftp and no other system may extract information (via API's, integration, etc..)		
13.20	Vendor shall provide security report monthly on system		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
14	Data Migration & System Integration		
14.1	<p>The system must be able to accept data migrated from the existing system. This data includes, but is not limited to, the following:</p> <ul style="list-style-type: none"> • Indexes as stored in an existing Oracle 10g data base. • All digital images and additional information currently stored in a database. This requirement may not be implemented until this function is under contract. 		
14.2	Must be capable of bulk data extraction which should include tax parcel ID numbers for indexing property tax liens.		
14.3	The system must provide the means of providing required information on a cover sheet to facilitate integration with the County Assessment department. This information as is available in the system from the recording process may be required to be available on a cover sheet or similar means.		
14.4	The system should have the ability to integrate/interface. This process should appear seamless to the public.		
14.5	System must have an unverified search of information from the PT 61 form by parcel identification number and or street address. This info is to be captured from the PT 61 forms that are indexed by the filing parties. This will be an unverified search and a statement at the top of the monitor screen must be printed clearly as a disclaimer. This may be done with an interface/integration with the Department of Revenue?		
14.6	Interface with tax assessor to locate the tax parcel ID from the PT 61 form and property information to populated Board of Equalization section of this system		
14.7	Interface with Tyler Odyssey case management system to allow documents to be sent electronically for court cases		
14.8	Property tax FIFAS to have a unique document type and parcel ID # to be used for data extraction.		

14.9	The ability to retrieve archived data after the vendor performs an upgrade (minor or major). The vendor shall either provide a tool for historical use or convert all of the old data.		
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No.	Requirement Description	Response E/M/P/O/C/X	Comments
15			
15.1	<p>The system must utilize latest version of Oracle 11g Enterprise Edition in a RAC or clustered configuration. Other database platforms will be considered as proposed.</p>	Back Office - Database	
15.2	<p>System must utilize ODBC compliant databases.</p>		
15.3	<p>For every document recorded, depending on the type of document, the system must be able to capture and store, but not be limited to, the following information:</p> <ul style="list-style-type: none"> • Instrument number • Document type (i.e., instrument type) • Date and time recorded (with unique seconds) • Book type • Book number • First page number, number of pages • Consideration amount • Property address & Parcel ID's • Name and return address • Name of submitter and address • County recording fees • Payment type(s) • Party types (this varies by document type) • Party names (all) - separate data elements for surname, given name, middle • Party AKA names (Also Known As) - for name changes, etc. An AKA name is defined to the system as equivalent to the specified party name • Firm Name (if party is a firm) NOTE: It will be important to distinguish between individual names and firm names during data entry • Instrument number or parent document (if a UCC) • Date of last change (for changes after document has been verified) 		
15.4	<p>System must provide user maintained table(s) for defining document fees, taxes and millage rates by document type.</p>		

15.5	System must have the ability to compute the total amount to be charged to record a specific document type based on the taxes and fees that together make up the total.		
15.6	System must allow the County to define the Recording fees as fixed fees, and/or fee calculations.		
15.7	Recording fees by document type must be definable on a per-page charge, per name charge, or flat fee charge.		
15.8	System must provide the ability to define a base rate for a base number of pages, and then to define additional fee amounts for additional pages beyond the base.		
15.9	User maintained calculations must include, but not be limited to all current document types and fee tables.		
15.10	Instruments presented may include parcels outside of the County and or state. If so, tax is only collected for this County's portion for the municipality. A user override of tax is required if an instrument covers multiple properties in multiple counties and or states.		
15.11	System must provide a user maintained table for setting up customer information, (i.e., a Firm Table). The Firm Table should capture sufficient customer information to support debit, credit, and draw down transactions.		
15.12	System must provide user maintained table(s) for defining and maintaining document and company codes. System must allow codes to be retrieved from the table during data entry, as well as return addresses for mailing back instruments.		
15.13	System must provide user maintained table(s) for commonly used party names. System must allow these names to be selected from the user-defined table(s) during indexing.		
15.14	System must provide the ability to enter and store unlimited grantor/grantee names, mortgagor/mortgagee names, or any other party type names.		
15.15	System should support modification of previously verified data with the appropriate level of security for modifications.		

15.16	System must provide the ability to establish security profiles for users that can be used to restrict access to specific types and groups of documents.		
15.17	System should provide the ability to establish role based security profiles for users that can be used to restrict access to specific types of activities. This would include, but not be limited to: entering new documents, updating documents, indexing documents, verifying documents, viewing document images, faxing documents, viewing secured documents and updating secured documents.		
15.18	System should provide the ability to restrict access to any menu option based on the user's ID. Alternatively, system should provide the ability to create and maintain custom menus for individual users and/or workgroups.		
15.19	System must provide the ability to restrict public access to "confidential" indexed documents.(i.e. Soldiers Discharges)		
15.20	System must provide the ability to copy name information when entering names into the cashiering, indexing, and verification modules.		
15.21	The vendor must clearly identify all system components and hardware specifications required to implement.		
15.22	The system must be capable of receiving simultaneous inputs of scanned data and index data from multiple workstations.		
15.23	The system database should be able to be stored in a variety of storage formats including but not limited to, Storage Area Networks (SAN), Clustered configuration and Replicated (redundant) systems. Vendors should estimate 30% of more required storage as appropriate with the proposed system.		

15.24	POS for public inquiry must be tied to the cashier stations in the record room. Ex. Customer s requests \$5.00 work of copies, the cashier can pull up the print request and see the \$5.00 charge and balance the register with the print request.		
15.25	POS can charge different prices for different print request when printing to the back (cashiers or on the floor.) EX \$2.50 for an index page and \$2.00 for a 11" X 17" plat.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
16	Tax Assessor		
16.1	Print more than 90 documents at one time		
16.2	A screen to select only what we use to transfer ownership: such as Warranty Deeds, Quit Claim Deeds, Limited Warranty, Special Warranty Deeds, and Deed Corrections etc. and any other document that has a PT61 form.		
16.3	A separate screen to print Plats and Surveys.		
16.4	Search by Name		
16.5	Search by book and page number		
16.6	Search by Instrument Type		
16.7	Search by Land Description		
16.8	Search by Street Name		

No.	Requirement Description	Response E/M/P/O/G/X	Comments
17	Tax Commissioner		
17.1	Receive books/pages for recording and transferring tax liens electronically via an secure API into this department system or via Ftp		
17.2	Receive confirmation that recording and transferring of tax liens was successfully completed		
17.3	Ability to view recorded tax lien documents		
17.4	Report of canceled tax liens		
17.5	Verification of tax payment status of a land parcel		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
18	Environment & Community Development		
18.1	Remote access to static copies of documents of the following nature and locatable by address or Parcel ID Number (PIN): plats, deeds, easements, associated indemnifications, active and historical liens, other encumbrances, etc.		
18.2	Remote access to static copies of documents of the following nature and locatable by PIN or development name: homeowners association charters, development agreements, etc.		
18.3	Remote access to current ownership information of for parcels locatable by property address or PIN		
18.4	Verification of tax payment status of a land parcel		
18.5	Provide Zoning (history) for a given parcel		
18.6	Identify Zoning Case Numbers and all Permit Numbers (Land disturbance and building) for a given parcel		
18.7	Tutorial and help capabilities for the software		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
19	Reports		
19.1	Agency billing report generated by agency/date		
19.2	Each cashier's daily report of receipts collected		
19.3	POS account listing with balances by date		
19.4	Summary report of payments collected by date/cashier		
19.5	Payments report by type		
19.6	Receipt report with breakdown of document types/fees collected/billed		
19.7	Audit trail report of corrections to funds		
19.8	Audit trail report of corrections to recording information		
19.9	Transfer tax distribution by date to municipalities with annual millage rate changes.		
19.10	Intangible tax distribution by date to municipalities with annual millage rate changes.		
19.11	Transfer tax detail by date.		
19.12	Intangible tax detail by date		
19.13	PT 61 details and status		
19.14	Breakdown reports of all payments collected and their disbursements to agencies/funds with annual millage rate changes.		
19.15	Staff statistics reports		
19.16	Cross reference report - When data entry clerk enters a linked / related document system to generate a report with the book and page # of the original document and the book and page # of the new linked document for the purpose of cross referencing on paper.		
19.17	Intangible tax distribution by commissioner district		
19.18	Transfer tax distribution by commissioner district		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
20	Financial Functions		
20.1	Make corrections to each cashier's drawer in the Record Room		
20.2	Prior period adjustments (without effecting the current day's reports)		
20.3	Create custom reports as needed and when laws and/or fees require changes within 30 days of request.		
20.4	Reports modified as needed without additional charges		
20.5	A 24 hour response time to balancing inquiries and discrepancies when report do not generate as they should (i.e. debits/credits don't balance)		
20.6	Financial reports should meet GAAP requirement & standards		
20.7	Incorporate a training simulation area for new hire trainees for the entire application		
20.8	System must be configure to meet new legislation with 30 days at no additional cost		
20.9	Provide supervisor the ability to create, modify, delete, and update system tables, forms, reports		

No.	Requirement Description	Response E/I/M/P/O/C/X	Comments
21	Board of Equalization		
21.1	Ability to scan final decisions into system		
21.2	System must generate be capable of generating notices for hearings		
21.3	Retrieve of the scanned images in the Public Inquiry system (internally and externally) by either Parcel ID, Address and Hearing Date		
21.4	Create custom reports as needed		
21.5	Ability of staff to input & record Board of Equalization Final decisions values for residential & commercial buildings and land		
21.6	Ability to schedule certified appeals appointments and generate notices(Date and Time)		
21.6	Ability to generate financial reports based on values by Commissioner districts, zip codes, city, municipality and total values weekly, monthly, and annually		
21.8	Ability to integrate into Tax Assessor system to eliminate duplicate data entry		
21.9	Ability to schedule hearings via calendar internally and online		
21.10	Ability to modify fields with supervisor functions		

No.	Requirement Description	Response E/M/R/O/C/X	Comments
22			
22.1	Provide 90 days of onsite user training after go live date		
22.2	Parallel testing for 3 weeks after the system is fully operational		
22.3	System must include a electronic training manual on all features		
22.4	<u>The vendor shall provide 90 days testing before implementation and 90 days testing after implementation of one on one sessions with the developers for both Clerk of Superior Court employees and public users to look at the system and make adjustments, modifications and changes</u>		

TECHNICAL REQUIREMENTS

HARDWARE AND SOFTWARE REQUIREMENTS

This section presents the requirements for the County's hardware and software standards. Actual memory sizes, processor speeds, peripherals and system software standards packages shall be recommended by the Proposer.

(Please provide complete hardware specifications within your response. Refer to below "County Standards" for acceptable configuration information.)

Fulton County desires to be provided with both the cost to purchase all hardware and connectivity for this solution as well as an optional complete, end-to-end, turnkey solution including all hardware necessary for the solution. Vendor must include a complete itemized hardware recommendation. Vendor's recommended hardware specifications must conform to the County hardware standards specified in this section. The goal is to have a high-performance system rather than an economical one.

Servers, desktops, laptops and tablet PCs shall not require administrator rights to operate.

The County standard prohibits providing administrator or root privileges to servers for executing any software in the production environment.

The County Standards for server operating systems are:

- Red Hat/Oracle Enterprise Linux 5
- Windows Server 2008 R2(64-bit compatibility)

The County standards for the desktop environment are:

- Microsoft Windows7/Windows Vista (proposed system must support both)
- Microsoft Office 2003/2007/2010 (proposed system must support all)
- Microsoft Outlook
- Microsoft Visio
- Internet Explorer 7.0 and higher (response must support both versions of Internet Explorer)
- Safari 6.0 and higher
- ESRI ArcGIS version 9.2 and higher

The County GIS standards for the server environment are:

- ArcIMS 9.2 and higher
- ArcSDE 9.2 and higher

The County standards for ad-hoc reporting are:

- Oracle© Discoverer
- Crystal Reports
- MS SQL Server 2000 Reporting Services
- Business Objects Xi

The County standards for database management system are:

- Oracle 10G and higher ©
- SQL Server 2008 and higher

The County standards for network protocols communicating externally are:

- Port 7070
- Any other ports must be approved by Fulton County Network Security

The County standards for network communication are:

- Ethernet
- Wireless 802.11g
- Wireless Cellular Broadband

The County standard for Telephony System is Cisco Call Manager v4.2.

Vendor must provide an indexed video file within 24 hours of each Commission Meeting. Vendor may provide an optional video stream if so desired, but Fulton County is under no obligation to accept this optional video stream, nor will it be accepted as a substitute for the required indexed video file.

The County standards for external streaming are:

- Must be hosted externally
- The current County external host vendor is Earthchannel
 - Costs to provide one 24 hour channel and VOD demand access for all necessary channels and additional storage must be included in the proposal.

INTERFACE WITH OTHER SYSTEMS

The proposed system should interface into existing systems running other applications for Fulton County. The system should have the ability to export as well as import any data required via the XML format. This includes the following systems among others as defined by Fulton County:

Apache 2.2 – See Acceptable Standards below

Interface	Description	Comment
Web Service	<ul style="list-style-type: none"> • Supports machine-to-machine interaction over the enterprise network • Meets W3C specification using XML messaging that follows the SOAP standard. • Machine readable description of the operations offered by the consumable system written in the Web Services Description Language (WSDL) 	<p>Best solution for supporting machine-to-machine data transmission over a network.</p>
be Really Simple Syndication (RSS)	<ul style="list-style-type: none"> • Family of web formats used to publish content in a standardize format • Data format follows the RSS specification using standardized XML 	<p>Good approach providing a structured data feed which can be easily processed.</p>
HTML	<ul style="list-style-type: none"> • Traditional browser markup language transmitted over HTTP. 	<p>Weak approach and should be used <i>sparingly</i> as the user interface design may not be compatible with that of the portal</p>

TESTING REQUIREMENTS

The system will undergo a process of certification, which shall include the following, prior to acceptance by the Fulton County Government:

- The proposer shall certify in writing to the County that the application system is completely installed, meets all design requirements, is free of defects, the data conversion is complete, accurate, correct and the total system (application, file building, conversion, back-up and recovery procedures) is ready for operation.
- The proposer shall be prepared to demonstrate all functions of the system prior to the start of user acceptance testing.
- The proposer shall provide documentation and interface specifics on each interface to our existing Fulton County systems.
- Upon receipt of the letter of certification from the proposer by Fulton County, a ninety (90) day period of user acceptance testing will commence. User

acceptance testing will include an intensive exercise of each component and module of the system simulating a normal workload. This testing will provide assurance that the various components and modules of the system operate as specified. During this period, the system shall demonstrate a total availability of 99.99% or more.

- Acceptance Criteria
 - The Application Software meets the current published product specifications and documentation;
 - The Application Software is capable of running a variety of data on a repetitive basis without failure;
 - The Application Software meets the requirements and specifications described in this document and discussed with Contractor during the analysis;
 - All Documentation has been delivered and reasonably accurately reflects the operation of the Application Software;
 - All specified training has been conducted and accepted by Fulton County.
 - The Interfaces properly provide the data necessary without disrupting the performance of the system or disrupting any of the original data files.
- Once this acceptance testing is complete and Fulton County verifies the acceptable installation, the warranty period will begin.
- The system will be considered “unavailable” if any of the following conditions occur:
 - Any component or module capability is not available to all active workstations.
 - Any feature or specification either required within this document or stated in the manufacturer’s response or literature does not perform as stated.
 - Conversion of all existing data files is not complete or is incompatible
 - Interface to existing systems has not been completed
 - Reporting features are not available
 - Training for support and user personnel is incomplete or has not been accepted by the technical designee specified the “Professional Services” section.

In addition, if the system is reloaded in entirety, either manually or automatically, the system will be assumed to be down for one full hour or actual time if greater, per occurrence. Scheduled system reloads will be counted as actual time down only.

In the event that the required level of reliability is not demonstrated at the end of the ninety day period, the County may, completely at its own discretion, allow a period, not to exceed ninety (90) days, during which the Proposer is allowed to correct any deficiencies with the system. If this extension is allowed, the Proposer shall reinitiate certification by submitting a revised letter of certification to the County within the sixty (60) day extension period specifying the corrections made to the system. The certification process described here will then be

repeated. This statement of the possibility of extension in no way obligates the County to do so.

Final acceptance will be made after the warranty period begins. This period will be a ninety-day (90) period of on-site post implementation support provided by the proposer to resolve any issues that arise after the system has been placed into production.

TRAINING REQUIREMENTS

The Vendor shall provide a detailed training plan outlining the documentation to be provided, training goal, learning objectives, and learning methods. The training plan shall also include any prerequisites required for training for both the user and technical support. If learning objectives are not met at the end of the training period, the Vendor shall provide alternate means to meet learning objectives. A minimum of 90 days shall be provided onsite training internal and external employees and customers on each major component/function of the system.

USER TRAINING

The types and amounts of user training that will be supplied at no additional cost shall be described. The proposer shall include a plan that results in acceptable training for system operation. Vendor shall recommend best practices and system configuration for effective system set up. Using this information, the vendor will prepare a manual (DVD/CD only) that defines all work flow processes and procedures for users. The vendor shall provide a sample of the typical manual or training approach as part of the response.

DoIT and Clerk of Superior Court IT TRAINING

The proposer shall prepare a training plan for County staff that will enable them to operate and support the system. This plan shall include any courses to be provided off-site, classroom training, and on-the-job training necessary for systems analysts, computer operators, security personnel, programmers, and database, web and network personnel. Training to provide complete support and custom programming and custom reporting will be provided to IT staff. Describe any prerequisite knowledge or skills required. If there are additional costs for this training it shall be clearly identified in the proposal.

Additionally, a description of the number and type of staff required to support the system must be provided. The skill sets required of each individual should be

included in this description. The description of staffing requirements should include all management, technical and functional areas for the ongoing support of the system. Training should be provided for a minimum of two employees in all support roles. "Train the trainer" methods of instruction will not be accepted.

During this training, Fulton County will designate senior technical personnel in each class to evaluate the training provided in order to ensure that the training and the instruction provided is sufficient to provide the necessary knowledge and skills. At the end of the first day of any training class, a signoff must be obtained from this designee in order for the proposer to meet this requirement.

APPLICATION DOCUMENTATION

It is required that the vendor provide an electronic copy, and optionally a paper copy of the following documentation. Please list all reproducible (DVD or CD format only) copies of documentation that will be provided prior to final system acceptance. For example:

1. User training manuals for all transactions and functions supported
2. Data Dictionary
3. Data model/entity relationship diagrams and data flow diagrams
4. System module chart (application flow) showing each application module and its relation to the other modules
5. General system design and reference information
6. System transaction flow and control
7. List of all application programs, with summary of their purpose or function including a table of all procedures or processes and which processes are called by what other processes
8. Detailed program documentation within each source module
9. Table definitions and record layouts
10. Definition of all system control tables
11. Report and workstation display formats
12. A listing of all "canned" reports complete with full descriptions of these reports.

The County shall be granted the rights the approval to duplicate application documentation at no additional charge provided that all proprietary markings of the Proposer are retained on all duplicates. Any duplicates produced will be utilized for the County only.

WARRANTY AND USABILITY

Warranty may be defined as the promise or guaranteed that a product or service will meet its agreed requirements. The warranty shall commence upon

completion of an evaluation period of the go-live period. The go-live period is defined as the instance in which the users begin to utilize the software application in a production environment and all testing has been complete and deemed successful.

The proposed solution shall be available when needed, in sufficient capacity, and dependable in terms of continuity and security. The proposed solution must have the capability to be highly available which means at a rate of 99.99% based on the agreed upon availability. In the event the proposed solution is unavailable due to a software fault, the time period from system failure to system operational shall be minimum and minimal impact to the users. The Proposer agrees that it will make corrections of the software application malfunctions during the warranty period and which are necessary to ensure usability. Usability may be defined as the ease with which the proposed solution may be used in reference to the agreed requirements. The Proposer agrees that software malfunctions that result in an inoperable system resulting in a financial impact to the County, or inefficient work-around, will be given the highest priority with the problem corrected as soon as practically possible. The Proposer shall strive to have any and all malfunctions resolved within no more than two (2) days.

MAINTENANCE AND SUPPORT

In the event, the Proposer fails to provide maintenance and support as agreed, the required pay shall be reduced to reflect such lack of maintenance and support services.

If the Proposer shall discontinue maintenance and support package and the County must obtain the new replacement package at the same rate as the original during the term of the original contract as well as renewals.

The escalation on maintenance shall not increase by no than more 2% of the previous year or CPI (Consumer Price Index), whichever is lower. The renewal of the annual software maintenance will take in consideration the increase in cost from one year to the next. Due to the environment of the County, minimal or no escalation is most feasible.

SOFTWARE LICENSES

Fulton County shall be charged the original published rate at the time of purchase for licenses fees for the duration of the contract which shall include any subsequent renewals of the contract. The fixed rate shall be applied to the renewal of licenses purchased during the initial contract as well as those that are purchased in addition to original licenses. The cost paid in initial contract, the

cost as posted in published fee schedule, or the cost as listed on sate contract, whichever is lesser amount.

If the County shall purchase licenses for the utilized of the proposed solution in a production environment, the County shall have access to additional licenses for utilization in non-production environments at no additional cost. The non-production environment may consist of the following: (1) test environment, (2) training environment, (3) development environment, and (4) back-up or disaster recovery; whichever environment is applicable. The utilization of licenses in a non-production environment shall apply regardless of the quantity and type of non-production environment.

SOURCE CODE

The Proposer shall promptly and continually update and supplement the source code as necessary with all correct, improvements, updates, releases, or other changes developed for the software as well as any documentation related to the software at no additional cost.; these costs shall be inherited in the maintenance and support agreements.

The source code shall not be written in a proprietary code and should allow reasonably skilled programmer to access the software without the assistance of the Proposer.

The Proposer agrees that in the event of the Proposer inability to exist as an entity, the Proposer shall promptly provide the County one (1) copy of the most current version of the source code for the affected software as well as any documentation related to the software. The affected software includes any primary and supporting modules that are owned by the Proposer and are in use by the County. The conditions include, but are not limited to: (1) ceases to market or make available maintenance and/or support of which the County is entitled to receive or purchase, (2) becomes insolvent, executes an assignment for the benefit of creditors, or subject to bankruptcy or receivership to proceed, (3) ceases business operations, or (4) transferred all or substantially all (>50%) of its assets or obligations to a 3rd party which has not assumed all obligations of vendor. In the event of the aforementioned item (4), the Proposer shall provide to the County a copy of the contract of terms and conditions outlining the agreement between the Proposer and the 3rd party. The terms and conditions which shall be provided are in respect to any entity (i.e., Fulton County Government) that has a legal binding agreement with the Proposer.

The Proposer shall deposit a copy of the source code in escrow with its Escrow Agent. The Proposer shall provide information in reference to the Escrow Agent

at the time the RFP is awarded. The information to be provided in reference to the Escrow Agent shall include the point of contact, company name, address, and telephone number. The Proposer shall also provide the annual escrow statement from the escrow holder.

MANAGEMENT REQUIREMENTS

PROFESSIONAL SERVICES

The Vendor shall provide both services that follow the guidelines for SDLC (Systems Development Life Cycle) to successfully implement this project. The phases that should be incorporated in this project by the Vendor are to include: 1) project planning, 2) requirements definition, 3) design, 4) development, 5) integration and test, 6) implementation, 7) operation and maintenance.

PROJECT PLANNING PHASE

During the planning stage, the Vendor shall verify that the goals and objectives of the software align with those of the customer (the County). The output of this phase should include documentation:

- Project plan and schedule
- Comprehensive listing of scheduled activities for the Requirements phase

REQUIREMENTS DEFINITION PHASE

This is the core of the project and therefore should be approached with thoroughness. The Vendor shall perform due diligence to ensure the requirements are defined in further detail to ensure the software application will meet the needs of the user. The requirements shall define the major functions of the proposed solution, operational data areas and reference data areas, as well as defined the initial data entities. The major functions include, but not limited to, critical processes and mission-critical inputs, outputs, and reports. Mission-critical may be defined as any aspect that has an effect on the operations of the direct and indirect departments that shall be impacted by the proposed solution. Additionally, a gap analysis shall be performed to identify any gaps in the current requirements and the functionality which the software application can provide. For those requirements that cannot be fully met the baseline software application, it shall be identified feasible work-around. The work-around must be of minimal impact to users and must be agreed upon by the users prior to final approval. The output of this phase should include the following documentation:

- Detailed requirements document

-
- Requirements traceability matrix which outlines how each requirement is linked to a specific product goal in a hierarchical listing
 - Updated project plan and schedule

DESIGN PHASE

The design phase will consist converting the approved requirements document into design elements. For a pre-packaged software application, design elements will consist of features and functionalities readily available in the baseline product. The design phase shall include detailed and comprehensive data modeling. The data model shall abide by standards set forth by ANSI, American National Standards Institute. The data modeling shall take into consideration the: detailed data requirements, technical environment, performance consideration, business processes (rules) and business data. The output of this phase should include the following documentation:

- Entity relationship diagram(s) with a full dictionary – this diagram should not be solely based on the data as defined in the baseline product; however, it shall include any data that is specific to the County
- Semantic or conceptual data model
- Table of business rules – this table should not be solely based on the data as defined in the baseline product; however, it shall include any data that is specific to the County
- Business process diagrams

DEVELOPMENT PHASE

The effort required for development of the solution in this phase may be minimal due to the ideal solution being that of a pre-package nature. However, this phase must be included to ensure the requirements and design requirements are being fulfilled. The Vendor shall configure and provide configuration instructions that shall be made to the software application to ensure the user's requirements are fulfilled. Any modifications that may be required to meet the user's requirements shall be clearly identified as a configurable option or customization to the code. It highly recommended the minimum or no customization be performed at the code level. However, if the aforementioned scenario can not be avoided, the vendor must include the impact of the customization in terms of initial cost, ongoing maintenance and support, and upgrades. The Vendor shall provide test cases for the modules, system, and users. The output of this phase should include the following documentation:

- Fully functional software that satisfies requirements and design elements

-
- Test plans – shall describe the test cases that will be utilized to validate the correctness and completeness of the software
 - Implementation plan

INTEGRATION AND TEST PHASE

In this phase, the software shall be moved from the development environment to a test environment. The reference data should be finalized, appropriate level of access and roles are provided for users. The test plan shall include: unit testing, system testing, integration testing, regression testing, and user acceptance testing. The output of this phase should include the following documentation:

- Integrated software
- Production implementation plan
- Acceptance plan which include test cases

IMPLEMENTATION

This phase shall be comprised of the acceptance, installation, deployment of the application so to ready the software application for a production environment. The proposer shall include the setup for a training/test environment on the test server which is completely separate from the live production server environment. This entails the completion of user acceptance testing as well as software specific testing. The user acceptance testing will include the successful testing of the user requirements as outlined in this document as well as those identified in the requirements gathering phase of the project. The software testing will include performance testing for each unit as well as the integration into various software modules. The software testing may also include the testing of integration with external applications. Successful execution of the test application is a prerequisite to acceptance of the software application by the customer. The output of this phase should include the following documentation:

- Test cases including results and person(s) who performed test
- Sign-off for acceptance of test cases

OPERATION AND MAINTENANCE

The operation and maintenance of the application will consist of a partnership of the Vendor and DoIT. Therefore, the vendor shall provide documentation that describes the requirements for the software application to function in a production environment. This Vendor shall provide all requirements needed for the application to be maintained in an operational environment.

MODIFICATIONS AND ADDITIONAL SERVICES

Any supplemental programming modifications to application, system, to include reports or other consulting services beyond the scope of the contract that are requested by Fulton County shall be provided by the Contractor at no cost to Fulton County for the first year. Said billing rates shall remain at those rates until one year from the execution of the Contract at which time the Contractor will provide time and materials assistance at the rate charged to other Contractor customers for similar services.

Prior to commencement of services, the Contractor shall define in writing the labor hours, billing rate, description of services and/or work to be performed, the changes or additions to the Application Software, the way in which the Application Software will function upon completion of the modifications, and the estimated time period for the services to be performed. Fulton County shall not be charged for any services until the additional services are approved by Fulton County personnel in writing. Only after the Contractor receives approval in writing from Fulton County will the Contractor perform the additional services.

PROJECT MANAGEMENT

Fulton County uses the Project Management Institute's (PMI) Project Management Body of Knowledge Guide (PMBOK) methodology as a project management best practice. The proposer should describe their experience in implementing and managing projects using PMBOK or a similar project management methodology.

The county is particularly interested in how the Proposer's project management approach utilizes the following or similar key process groups when implementing a project. Also, the Proposer should provide documentation which shows their understanding of the application of such documents within each key process group.

INITIATING

This stage includes preparing the up the project for success by identifying the right team (especially the project manager) and scope, as well as determining the relationship between the project and its alignment with the client's overall objectives.

PLANNING

This stage includes developing the relevant resources, timelines and milestones, and aligning project deliverables to business priorities (i.e. risk management,

communications, quality, cost/budgeting, duration and sequencing, external dependencies). The output of this phase should include the following documentation:

- Project plan
- WBS including deliverables with estimated start and end dates for each activity and the required resource. These dates shall be monitored and adhered to; the inability to meet scheduled dates of a task within the critical path must be submitted to the PMO and approved prior to making change in the schedule. If the project is not complete as scheduled, a penalty will be enforced. This penalty will include a deduction of .1% of professional services for every business day the project is delayed.

EXECUTING

This phase includes assigning a project team and distributing information to ensure the proper project activities are undertaken. This process also includes ensuring quality assurance methods are in place to address change management. The output of this phase should include the following documentation:

- Regularly scheduled status meetings as outlined in the communication section of the project plan.
- Issue tracking log – all issues pertaining to the project shall be monitored and tracked throughout the project lifecycle. Upon closure of an issue, the issue shall not be deleted but rather moved to an archive issue log.

CONTROLLING AND MONITORING

This phase includes ensuring the resulting project activities is in check with the original project charter and plan, and risk from uncontrolled external actions is mitigated.

- Monitor quality, costs and schedule;
- Manage stakeholder relationships, risk and contract monitoring;
- Identify discrepancies (or variations) within the project schedule to ensure project schedule is met.
- Ensure proper project communications

CLOSING

This phase entails making sure you have delivered everything expected of the project based upon the agreed upon terms in the requirements gathering phase as well as the acceptance criteria.

Fulton County will provide an internal Project Manager to coordinate with the

Project Manager of the vendor. This project manager will be responsible for providing all necessary Fulton County resources and for providing an independent status report to the County on the progress of the project as well as obtaining the necessary approvals for each milestone.

The following services will be required of the Project Manager:

- Identify County's current Business Processes that exist today. Including a gap analysis to identify and document existing gaps between the selected software applications and current business processes. The vendor should anticipate that the County might modify processes to match the selected solutions pre-configured system rather than make custom software modifications.
- Provide the County with the development of a project plan, project schedule and a high-level project budget including software, services, training and maintenance necessary to successfully implement a legislative information management and tracking system.

CONTRACT ADMINISTRATION AND MANAGEMENT

The administration and management of the contract(s) shall be that of an iterative process in that the contracts shall be negotiated until an agreement may be reached by all parties involved, particularly the County. A sample contract may be found in Section 12 of this document.

Additionally, Service Level Agreement (SLA) will be required which shall formerly define the level of service, responsibilities, guarantees, and warranties. The SLA shall specify availability, serviceability, performance, and operation. The SLA shall outline helpdesk hours, response times, call priorities, call process, escalation process, and schedules. In the event of the business days of the company are not in-line with the business days of the County, the Proposer shall provide reasonable alternate solutions at no cost to the County. The SLA shall be continuously monitored for compliance with agreed upon levels of service. Any failure to comply with SLA levels will result in monetary penalties.

In the event the Proposer neglect to perform the services properly or fail to comply with the requirements set forth in the contract, the Proposer shall correct the default at no additional cost to the County. If the Proposer fails to correct the default within sixty (60) days, the County shall have the option to terminate the agreement without cost. Upon termination, the Proposer shall comply with the source code requirements outlined in Section 4.11.

3.4 TECHNICAL PROPOSAL FORMAT AND CONTENT

The Technical Proposal shall include the appropriate and requested information in sufficient detail to demonstrate the Proposer's knowledge, skills and abilities to provide requested services.

The Technical Proposal shall be arranged and include content as described below:

Section 1 - Executive Summary

The executive summary shall include the following information:

- Provide the legal name of the entity responding to this proposal.
- Provide the business type of the entity responding to this proposal (i.e. Joint Venture, Partnership, etc).
- Include a brief statement of approach to the work, understanding of the project's goals and objectives and demonstrated understanding of the project's potential problems and concerns.

Section 2 – Project Plan

1. Name, address and telephone number of one (1) individual to whom all future correspondence and/or communications will be directed.
2. The Project Plan must address the management approach in completing the work identified in Section 3.3 Scope of Work. At a minimum, the plan must identify all major tasks, when the major tasks will start and finish, planned reviews of work associated with each major task, project completion date, and any other information that will assist in the planning and tracking this project successfully. Describe methodologies including best practices and benchmarks to be used.
3. Description of project deliverables.

Section 3 – Project Team Qualifications/ Qualifications of Key Personnel

1. Provide resumes for each of the key personnel proposed for this project with specific emphasis on the Project Manager.

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2. All proposed key personnel must have at least a minimum of three (3) years work experience in the State of Georgia appraisal contract work.
 3. The Project Manager must have a minimum of five (5) years experience in real estate mass appraisal and must have completed a sexennial re-evaluation and a triennial update project within the past five (5) years in the State of Georgia.
 4. Each resume should be limited to no more than three (3) pages per person and be organized according to the following:
 - Name and Title
 - Professional Background
 - Current and Past Relevant Work Experience
 - Include two (2) references for each key personnel member on similar projects.

Section 4 – Relevant Project Experience

Identify three (3) projects where the Proposer has performed at least three (3) analysis or process reviews of a Property Tax System with entities comparable to Fulton County within the past three (3) years. Such entities include cities and/or counties which provide appraisal and assessment of real and tangible business personal property. Limit your response to one (1) page per project; please provide the following information for each project:

- The name of the project, the owner, year performed and the project location.
- A description of the project.
- A reference, including a contact name, addresses and phone number. This reference should be the owner's staff member who was in charge of the project for the owner.

Section 5 – Proposer Financial Information

It is the policy of the County to conduct a review of a firm's financial responsibility in order to determine the firm's capability to successfully perform the work.

If submitting as a Joint Venture, Partnership, Limited Liability Corporation or Limited Liability Partnership, the financials must be submitted for each entity that comprises the prime contractor.

The following documentation is required in order for the County to evaluate financial responsibility:

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- (1) Provide audited financial statements for the last three (3) years, including income statements, balance sheets, and any changes in financial position.
 - (2) The latest quarterly financial report and a description of any material changes in financial position since the last audited financial statement.
 - (3) Proposer's most recent Dun & Bradstreet, Value Line Reports or other credit ratings/report.
 - (4) Identify any evidence of access to a line or letter of credit.

Section 6 - Availability of Key Personnel

- (1) Percentage of time key personnel will spend on this project
- (2) Current workload of key personnel

Section 7- Local Preference

Local Preference is given to businesses that have a business location within the geographic boundaries of Fulton County. The term business location means that the business has a staffed, fixed, physical place of business located within Fulton County and has had the same for at least one (1) year prior to the date of the business' submission of its proposal or bid, as applicable and has had held a valid business license from Fulton County or a city located within Fulton County for the business at a fixed, physical, place of business, for at least one (1) year prior to the date of the business' submission of its proposal or bid as applicable.

In order to receive the Local Preference points of ten (10) points the Proposer must meet one (1) of the following criteria, provide supporting documentation as required and certify under oath that it is eligible to receive the local preference points by signing and submitting Form H, Local Preference Affidavit located in Section 5 of this RFP

The Proposer must indicate which one (1) of the following criteria they will utilize in order to receive local preference:

1. Business having a business location within the geographic boundaries of Fulton County.

The following supporting documentation must be provided:

- Copy of occupational tax certificate (business license) form Fulton County or a city located within Fulton County, or;
- Copy of a lease or rental agreement, or;

-
- Proof of ownership interest in a location within the geographical boundaries of Fulton County.
2. Businesses where at least fifty-one percent (51%) of the owners of the business are residents of Fulton County but the business is located outside of Fulton County.

The following supporting documentation must be provided:

- Provide the residential address of the business owner(s).
3. Businesses where at least fifty-one percent (51%) of the employees of the business are residents of Fulton County but the business is located outside of Fulton County.

The following supporting documentation must be provided:

- Provide a list of all employees name and address.

Failure to provide the required supporting documentation with your proposal submittal shall result in your firm receiving a "0" (zero) for Local Preference. In the event the affidavit or other declaration under oath is determined to be false, such business shall be deemed "non-responsive" and shall not be considered for award of the applicable contract.

Section 8 – Disclosure Form and Questionnaire

It is the policy of Fulton County to review the history of litigation of each Proposer that includes bankruptcy history, insolvency history, civil and criminal proceedings, judgments and termination for cause in order to determine whether a firm's business practices, legal practices and overall reputation in the industry is one that would be acceptable to perform work for Fulton County. The Disclosure Form and Questionnaire is provided in Section 5, Proposal Forms, Form D.

Section 9 – Service-Disabled Veteran Business Enterprise (SDVBE) – Any business which is an independent and continuing operation for profit, performing a commercially useful function, and is owned and controlled by one or more individuals who are at least thirty percent (30%) disabled as a result of military service who has been honorably discharged, designed as such by the United States Department of Veterans Affairs, and which is located within the geographic boundaries of Fulton County.

Section 10 - Cost

The hourly rates of each respondent will be totaled and divided by the number of classifications requested to determine the respondents' average hourly rate. The respondent with the lowest average hourly rate will receive the full 10 points. For respondents with the second, third, fourth, etc., their average hourly rates will be divided into the lowest average hourly rate and multiplied by 10, the total points allowed for cost.

The County has established the following formula to evaluate cost proposals for Request for Proposals (RFP):

Lowest cost submitted

Each successive cost \times Points allocated for cost in RFP = Cost proposal score

The respondent with the lowest total cost will receive the full 10 points. For respondents with the second, third, fourth, etc., their total costs will be divided into the lowest cost and multiplied by 10, the total points allowed for cost.

The County has established the following formula to evaluate cost proposals for Request for Proposals (RFP):

Lowest cost submitted

Each successive cost \times Points allocated for cost in RFP = Cost proposal score

3.5 COST PROPOSAL FORMAT AND CONTENT

The Cost Proposal shall be provided in a **separate sealed envelope**. The Cost Proposal shall include current information and shall be arranged and include content as described below:

Section 1 - Introduction

The Proposer shall include an introduction which outlines the contents of the Cost Proposal.

Section 2 - Completed Cost Proposal Forms

The Proposer is required to complete **all** of the Cost Proposal Forms provided.

COST PROPOSAL FORMS
(DO NOT MODIFY THESE COST PROPOSAL FORMS. MODIFICATION TO THIS FORM WILL CAUSE THE PROPOSAL SUBMISSION TO BE DEEMED NON-RESPONSIVE)

SOFTWARE ACQUISITION COSTS		
Core Software		\$
Additional Module(s) (If Required)		\$
Customizations (If Required)		\$
Third Party Software (If Required)		\$
Interface/Integration		\$
USER LICENSE COSTS		
Administrator (Cost each \$ _____ x Recommended		\$
Standard User (Cost each \$ _____ x Recommended		\$
View-only License (Cost each \$ ___ x Recommended quantity)		\$
PLANNING AND IMPLEMENTATION COSTS		
Professional Services		\$
Travel and Reimbursable Expenses		\$
On-site Training		\$
CONVERSION AND DATA CLEANUP COSTS		
Professional Services		\$
HARDWARE COST		
Server Hardware		\$
Additional Hardware (If Required)		\$
Server Software Req'd (server operating system, virtualization software.)		\$
TOTAL ACQUISITION AND IMPLEMENTATION COST		\$
YEAR ONE OPERATION COSTS		

Support and Upgrades	\$
Professional Services required for software upgrades	\$
YEAR TWO OPERATION COSTS	
Support and Upgrades	\$
Professional Services required for software upgrades	\$
TOTAL COST	\$
<p>Recommended Optional Items – Provide list and description, including the additional functionality provided, cost, maintenance costs and license requirements in a SEPARATELY SEALED/LABELED (RECOMMENDED OPTIONAL ITEMS) and NARRATIVE AS TO WHY YOUR FIRM WOULD RECOMMEND THIS OPTION BE CONSIDERED.</p>	

Notice – Due to the budgetary system of Fulton County, no payment can be made from November first of any calendar year until February first of the subsequent year. Fulton County will make every reasonable effort to have funding for anticipated payments approved prior to this “blackout” period. However, no penalties or interest for late payments will be imposed on Fulton County for payments scheduled during this period.

**SECTION 4
EVALUATION CRITERIA**

4.1 PROPOSAL EVALUATION – SELECTION CRITERIA

The following criteria will be used to evaluate the proposals submitted in response to this RFP:

Evaluation Criteria	Weight
Project Plan/Approach to Work	25%
Qualifications of Key Personnel	15%
Relevant Project Experience/ Past performance	15%
Financial Responsibility	5%
Availability of Key Personnel	5%
Local Preference	10%
Service Disabled Veterans Preference	5%
Disclosure Form and Questionnaire	5%
Cost Proposal	15%
TOTAL POINTS	100%

SECTION 5 PROPOSAL FORMS

5.1 INTRODUCTION

To be deemed responsive to this RFP, Proposers must provide the information requested and, where applicable, complete in detail all Proposal Forms. The appropriate individual(s) authorized to commit the Proposer to the Project must sign the Proposal Forms. As appropriate, Proposers shall reproduce each Proposal Form and complete the appropriate portions of the forms provided in this section.

Form A: Certification Regarding Debarment

Form B: Non-Collusion Affidavit of Bidder/Offeror

Form C: Certificate of Acceptance of Request for Proposal Requirements

Form D: Disclosure Form and Questionnaire

Form E: Georgia Security and Immigration Contractor Affidavit/Agreement

Form F: Georgia Security and Immigration Subcontractor Affidavit

Form G: Professional License

Form H: Local Preference Affidavit of Bidder/Offeror

5.2 PROPOSAL FORMS DESCRIPTION

Certification Regarding Debarment

Proposer shall complete and submit **Form A**, which certifies that neither it nor its subcontractors are presently debarred, suspended, proposed for debarment, declared ineligible, or otherwise excluded from doing business with any government agency.

Non-Collusion Affidavit of Bidder/Offeror

The Proposal shall include a copy of Proposal **Form B**, executed by an authorized officer of the corporation. Proposals developed by a joint venture shall be similarly executed by all joint venture participants.

Certificate of Acceptance of Request for Proposal Requirements

Proposer shall complete and submit **Form C**, which certifies that Proposer has read the solicitation including all addenda, exhibits, attachments and appendices.

Disclosure Form and Questionnaire

The offerors and their joint venture partners or team members and first-tier subcontractors, shall complete and submit **Form D**, which requests disclosure of business and litigation.

Georgia Security and Immigration Contractor Affidavit and Agreement

Proposer shall complete and submit **Form E**, in order to comply with the requirements of O.C.G.A. 13-10-91 and the Georgia Department of Labor Rule 300-10-01-.02.

Georgia Security and Immigration Subcontractor Affidavit

Proposer shall ensure that any subcontractor(s) that will be utilized for this project shall complete and submit **Form F**, Subcontractor Affidavit.

Professional License

Proposer and any subcontractor(s) performing work required by state law to be licensed must provide a copy of their license for the work they will perform on this project. **Form G**

Local Preference Affidavit of Bidder/Offer

Proposer shall complete and submit **Form H**, which certifies that the Proposer is eligible to receive local preference points.

FORM A: CERTIFICATION REGARDING DEBARMENT

- (1) The Offeror certifies that neither it or its subcontractors is presently debarred, suspended, proposed for debarment, declared ineligible, or otherwise excluded from doing business with any government agency. Any such exclusion may cause prohibition of your firm from participating in any procurement by the Fulton County Government.
- (2) If the Offeror is unable to certify to any of the statements in this certification, such Offeror or subcontractor shall attach an explanation to this bid or proposal.

INSTRUCTIONS FOR CERTIFICATION

By signing and submitting this certification, the Offeror is providing the certification set out below:

- (1) The certification in this clause is a material representation of fact upon which reliance will be placed. If it is later determined that the prospective vendor knowingly rendered a false certification, the Purchasing Agent may pursue all available remedies, including suspension and/or debarment, for withdrawal of award or termination of a contract.
- (2) The prospective Offeror shall provide immediate written notice to the Purchasing Agent if at anytime the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (3) Offeror shall be under a continuing duty to immediately inform the Purchasing Agent in writing of any changes, if as a result of such changes, the Offeror certification regarding debarment is affected.

DEBARMENT ORDINANCE

The following Section 2-322 of Fulton County Code of Laws establishes the procedure for the debarment of contractors.

(a) *Authority to suspend.*

After reasonable notice to the entity involved and reasonable opportunity for that entity to be heard, the Purchasing Agent, after consultation with user department, the County Manager and the County Attorney shall have the authority to suspend an entity for cause from consideration for award of county contracts. As used in this section, the term entity means any business entity, individual, firm, contractor, subcontractor or business corporation, partnership, limited liability corporation, firm, contractor, subcontractor or business structured; provided, further, that any such entity shall also be subject to suspension under this section if any of its constituents, members, subcontractors at any tier of such entity's and the entity, or any constituent or member, knew or should have known of the commission of the act. The suspension shall be for a period not to exceed three (3) years unless cause is based on a felony conviction for an offense related or associated with fraudulent contracting or misappropriation of funds wherein the suspension shall not exceed seven (7) years.

(b) Causes for Suspension. The causes for suspension include:

- 1) Conviction for commission of a criminal offense as an incident to obtain or attempting to obtain a public or private contract or subcontract, or in performance of such contract or subcontract;
- 2) Conviction of state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property or other offense indicating a lack of business integrity or business honesty which currently, seriously and directly affects responsibility as a county contractor.
- 3) Conviction of state or federal anti-trust statutes arising out of the solicitation and submission of bids and proposals;
- 4) Violation of contract provisions, as set forth below, of a character which is regarded by the Purchasing Agent to be so serious as to justify suspension action:
 - a. Failure to perform in accordance with the specifications within a time limit provided in a county contract;
 - b. A recent record of failure to perform or unsatisfactory performance in accordance with the terms of one or more contracts; provided, that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for suspension;
 - c. Material representation of the composition of the ownership or workforce or business entity certified to the county as a minority business enterprise; or
 - d. Falsification of any documents.
- i. For violation of the ethical standards set forth in Fulton County Code Chapter 9, Code of Ethics.
- ii. Knowing misrepresentation to the county, of the use which a majority owned contractor intends to make a minority business enterprise (a business entity at least 51 percent of which is owned and controlled by minority persons, as defined in Fulton County Code Chapter 6, Article B, Minority Business Enterprise Affirmative Action Program and certified as such by the County) as a subcontractor or a joint venture partner, in performing work under contract with the County.

Failure to fully and truthfully provide the information required, may result in the disqualification of your bid/proposal from consideration or termination of the Contract, once awarded. This document must be completed and included as a part of the bid/proposal package along with other required documents.

[SIGNATURES ON NEXT PAGE]



Under penalty of perjury, I declare that I have examined this certification and all attachments hereto, if applicable, to the best of my knowledge and belief, and all statements contained hereto are true, correct, and complete.

On this _____ day of _____, 2012

(Legal Name of Proponent) (Date)

(Signature of Authorized Representative) (Date)

(Title)

STATE OF GEORGIA

COUNTY OF FULTON

FORM B: NON-COLLUSION AFFIDAVIT OF BIDDER/OFFEROR

I, _____ certify that pursuant to Fulton County Code Section 2-320 (11), this bid or proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a bid for the same work, labor or service to be done or the supplies, materials or equipment to be furnished and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of state and federal law and can result in fines, prison sentences and civil damages awards. I agree to abide by all conditions of this bid or proposal and certify that I am authorized to sign this bid or proposal for the bidder.

Affiant further states that pursuant to O.C.G.A. Section 36-91-21 (d) and (e), _____ has not, by itself or with others, directly or indirectly, prevented or attempted to prevent competition in such bidding or proposals by any means whatsoever. Affiant further states that (s)he has not prevented or endeavored to prevent anyone from making a bid or offer on the project by any means whatever, nor has Affiant caused or induced another to withdraw a bid or offer for the work.

Affiant further states that the said offer of _____ is bona fide, and that no one has gone to any supplier and attempted to get such person or company to furnish the materials to the bidder only, or if furnished to any other bidder, that the material shall be at a higher price.

(COMPANY NAME)

(PRESIDENT/VICE PRESIDENT)

Sworn to and subscribed before me this _____ day of _____, 2012.

(SECRETARY/ASSISTANT SECRETARY)

(Affix corporate seal here, if a corporation)

Notary Public: _____

County: _____

Commission Expires: _____

NOTE:

IF THE OFFEROR IS A PARTNERSHIP, ALL OF THE PARTNERS AND ANY OFFICER, AGENT, OR OTHER PERSON WHO MAY HAVE REPRESENTED OR ACTED FOR THEM IN BIDDING FOR OR PROCURING THE CONTRACT SHALL ALSO MAKE THIS OATH.

IF THE OFFEROR IS A CORPORATION, ALL OFFICERS, AGENTS, OR OTHER PERSONS WHO MAY HAVE ACTED FOR OR REPRESENTED THE CORPORATION IN BIDDING FOR OR PROCURING THE CONTRACT SHALL MAKE THE OATH.

FORM C: CERTIFICATE OF ACCEPTANCE OF REQUEST
FOR PROPOSAL REQUIREMENTS

This is to certify that on this day, offeror acknowledges that he/she has read this solicitation document, pages # _____ to # _____ inclusive, including any addenda # _____ to # _____ exhibit(s) # _____ to # _____, attachment(s) # _____ to # _____, and/or appendices # _____ to # _____, in its entirety, and agrees that no pages or parts of the document have been omitted, that he/she understands, accepts and agrees to fully comply with the requirements therein, and that the undersigned is authorized by the offeror to submit the proposal herein and to legally obligate the offeror thereto.

This is also to certify that the offeror has reviewed the form Fulton County contract included in the solicitation documents and agrees to be bound by its terms, or that the offeror certifies that it is submitting any proposed modification to the contract terms with its proposal. The offeror further certifies that the failure to submit proposed modifications with the proposal waives the offeror's right to submit proposed modifications later. The offeror also acknowledges that the indemnification and insurance provisions of Fulton County's contract included in the solicitation documents are non-negotiable and that proposed modifications to said terms may be reason to declare the offeror's proposal as non-responsive.

Company: _____

Signature: _____

Name: _____

Title: _____ Date: _____

(Affix Corporate Seal)

Form D: OFFEROR'S DISCLOSURE FORM AND QUESTIONNAIRE

1. Please provide the names and business addresses of each of the Offeror's firm's officers and directors.

For the purposes of this form, the term "Offeror" means an entity that responds to a solicitation for a County contract by either submitting a proposal in response to a Request for Proposal or a Request for Qualification or a Bid in response to an Invitation to Bid. Describe accurately, fully and completely, their respective relationships with said Offeror, including their ownership interests and their anticipated role in the management and operations of said Offeror.

2. Please describe the general development of said Offeror's business during the past five (5) years, or such shorter period of time that said Offeror has been in business.
3. Please state whether any employee, agent or representative of said Offeror who is or will be directly involved in the subject project has or had within the last five (5) years: (i) directly or indirectly had a business relationship with Fulton County; (ii) directly or indirectly received revenues from Fulton County; or (iii) directly or indirectly receives revenues from the result of conducting business on Fulton County property or pursuant to any contract with Fulton County. Please describe in detail any such relationship.

LITIGATION DISCLOSURE:

Failure to fully and truthfully disclose the information required, may result in the disqualification of your bid or proposal from consideration or termination of the Contract, once awarded.

1. Please state whether any of the following events have occurred in the last five (5) years with respect to said Offeror. If any answer is yes, explain fully the following:

(a) whether a petition under the federal bankruptcy laws or state insolvency laws was filed by or against said Offeror, or a receiver fiscal agent or similar officer was appointed by a court for the business or property of said Offeror;

Circle One: YES NO

(b) whether Offeror was subject of any order, judgment, or decree not subsequently reversed, suspended or vacated by any court of competent jurisdiction, permanently enjoining said Offeror from engaging in any type of business practice, or otherwise eliminating any type of business practice; and

Circle One: YES NO

(c) whether said Offeror's business was the subject of any civil or criminal proceeding in which there was a final adjudication adverse to said or Offeror, which directly arose from activities conducted by the business unit or corporate division of said Offeror which submitted a bid or proposal for the subject project. If so please explain.

Circle One: YES NO

2. Have you or any member of your firm or team to be assigned to this engagement ever been indicted or convicted of a criminal offense within the last five (5) years?

Circle One: YES NO

3. Have you or any member of your firm or team been terminated (for cause or otherwise) from any work being performed for Fulton County or any other Federal, State or Local Government?

Circle One: YES NO

-
4. Have you or any member of your firm or team been involved in any claim or litigation adverse to Fulton County or any other federal, state or local government, or private entity during the last three (3) years?

Circle One: YES NO

5. Has any Offeror, member of Offeror's team, or officer of any of them (with respect to any matter involving the business practices or activities of his or her employer), been notified within the five (5) years preceding the date of this offer that any of them are the target of a criminal investigation, grand jury investigation, or civil enforcement proceeding?

Circle One: YES NO

If you have answered "YES" to any of the above questions, please indicate the name(s) of the person(s), the nature, and the status and/or outcome of the information, indictment, conviction, termination, claim or litigation, the name of the court and the file or reference number of the case, as applicable. Any such information should be provided on a separate page, attached to this form and submitted with your proposal.

NOTE: If any response to any question set forth in this questionnaire has been disclosed in any other document, a response may be made by attaching a copy of such disclosure. (For example, said Offeror's most recent filings with the Securities and Exchange Commission ("SEC") may be provided if they are responsive to certain items within the questionnaire.) However, for purposes of clarity, Offeror should correlate its responses with the exhibits by identifying the exhibit and its relevant text.

Disclosures must specifically address, completely respond and comply with all information requested and fully answer all questions requested by Fulton County. Such disclosure must be submitted at the time of the bid or proposal submission and included as a part of the bid/proposal submitted for this project. Disclosure is required for Offerors, joint venture partners and first-tier subcontractors.

Failure to provide required disclosure, submit officially signed and notarized documents or respond to any and all information requested/required by Fulton County can result in the bid/proposal declared as non-responsive. This document must be completed and included as a part of the bid/proposal package along with other required documents.

[SIGNATURES ON NEXT PAGE]

Under penalty of perjury, I declare that I have examined this questionnaire and all attachments hereto, if applicable, to the best of my knowledge and belief, and all statements contained hereto are true, correct, and complete.

On this _____ day of _____, 2012

(Legal Name of Proponent) (Date)

(Signature of Authorized Representative) (Date)

(Title)

Sworn to and subscribed before me,

This _____ day of _____, 2012

(Notary Public) (Seal)

Commission Expires _____
(Date)

**FORM E: GEORGIA SECURITY AND IMMIGRATION CONTRACTOR
AFFIDAVIT**

Instructions:

Contractors must attest to compliance with the requirements of O.C.G.A 13-10-91 and the Georgia Department of Labor Rule 300-10-01-.02 by executing the Contractor Affidavit.

STATE OF GEORGIA

COUNTY OF FULTON

**FORM E: GEORGIA SECURITY AND IMMIGRATION CONTRACTOR AFFIDAVIT
AND AGREEMENT**

By executing this affidavit, the undersigned contractor verifies its compliance with O.C.G.A. 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services under a contract with **[insert name of prime contractor]** _____ on behalf of **Fulton County Government** has registered with and is participating in a federal work authorization program* [any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or any equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603], in accordance with the applicability provisions and deadlines established in O.C.G.A. 13-10-91.

The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services to this contract with **Fulton County Government**, contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A. 13-10-91 on the Subcontractor Affidavit provided in Rule 300-10-01-.08 or a substantially similar form. Contractor further agrees to maintain records of such compliance and provide a copy of each such verification to the **Fulton County Government** at the time the subcontractor(s) is retained to perform such service.

EEV/Basic Pilot Program* User Identification Number ***(Failure to provide with during bid submittal may cause the proposal submittal to be deemed non-responsive)***

BY: Authorized Officer of Agent
(Insert Contractor Name)

Title of Authorized Officer or Agent of Contractor

Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me this _____ day of _____, 2012.

Notary Public: _____

County: _____

Commission Expires: _____

NOTE:

* As of the effective date of O.C.G.A. 13-10-91, the applicable federal work authorization program is the "EEV/Basic Pilot Program" operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security, in conjunction with the Social Security Administration (SSA).

**FORM F: GEORGIA SECURITY AND IMMIGRATION SUBCONTRACTOR
AFFIDAVIT**

Instructions:

In the event that your company is awarded the contract for this project, and will be utilizing the services of any subcontractor(s) in connection with the physical performance of services pursuant to this contract, the following affidavit must be completed by such subcontractor(s). Your company must provide a copy of each such affidavit to Fulton County Government, Department of Purchasing & Contract Compliance with the proposal submittal.

All subcontractor affidavit(s) shall become a part of the contract and all subcontractor(s) affidavits shall be maintained by your company and available for inspection by Fulton County Government at any time during the term of the contract. All subcontractor(s) affidavit(s) shall become a part of any contractor/subcontractor agreement(s) entered into by your company.

STATE OF GEORGIA

COUNTY OF FULTON

FORM F: GEORGIA SECURITY AND IMMIGRATION SUBCONTRACTOR AFFIDAVIT

By executing this affidavit, the undersigned subcontractor verifies its compliance with O.C.G.A. 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services under a contract with **[insert name of prime contractor]** _____ behalf of **Fulton County Government** has registered with and is participating in a federal work authorization program* [any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or any equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603], in accordance with the applicability provisions and deadlines established in O.C.G.A. 13-10-91.

EEV/Basic Pilot Program* User Identification Number ***(Failure to provide with during bid submittal may cause the proposal submittal to be deemed non-responsive)***

BY: Authorized Officer of Agent
(Insert Subcontractor Name)

Title of Authorized Officer or Agent of Subcontractor

Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me this _____ day of _____, 2012.

Notary Public: _____

County: _____

Commission Expires: _____

NOTE:

* As of the effective date of O.C.G.A. 13-10-91, the applicable federal work authorization program is the "EEV/Basic Pilot Program" operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security, in conjunction with the Social Security Administration (SSA).

FORM G: GEORGIA PROFESSIONAL LICENSE CERTIFICATION

NOTE: Please complete this form for the work your firm will perform on this project.

Contractor's Name: _____

Performing work as: Prime Contractor _____ Sub-Contractor _____

Professional License Type: _____

Professional License Number: _____

Expiration Date of License: _____

I certify that the above information is true and correct and that the classification noted is applicable to the Bid for this Project.

Signed: _____

Date: _____

(ATTACH COPY OF LICENSE)

STATE OF GEORGIA

COUNTY OF FULTON

FORM H: LOCAL PREFERENCE AFFIDAVIT OF BIDDER/OFFEROR

I hereby certify that pursuant to Fulton County Code Section 102-358(f), the Bidder/Offeror _____ is eligible to receive local preference points and has a staffed, fixed, physical, place of business located within Fulton County and has had the same for at least one (1) year prior to the date of submission of its proposal or bid and has held a valid business license from Fulton County or a city within Fulton County boundaries for the business at a fixed, physical, place of business, for at least one (1) year prior to the date of submission of its proposal or bid.

Affiant further acknowledges and understands that pursuant to Fulton County Code Section 102-358(f), in the event this affidavit is determined to be false, the business named herein shall be deemed "non-responsive" and shall not be considered for award of the applicable contract.

(BUSINESS NAME) (Affix corporate seal here, if a corporation)

(FULTON COUNTY BUSINESS ADDRESS)

(OFFICIAL TITLE OF AFFIANT)

(NAME OF AFFIANT)

(SIGNATURE OF AFFIANT)

Sworn to and subscribed before me this _____ day of _____, 2012.

Notary Public: _____

County: _____

Commission Expires: _____

SECTION 6
CONTRACT COMPLIANCE REQUIREMENTS

6.1 NON-DISCRIMINATION IN PURCHASING AND CONTRACTING

It is the policy of Fulton County Government that discrimination against businesses by reason of the race, color, gender or national origin of the ownership of any such business is prohibited. Furthermore, it is the policy of the Board of Commissioners ("Board") that Fulton County and all vendors and contractors doing business with Fulton County shall provide to all businesses the opportunity to participate in contracting and procurement paid, in whole or in part, with monetary appropriations of the Board without regard to the race, color, gender or national origin of the ownership of any such business. Similarly, it is the policy of the Board that the contracting and procurement practices of Fulton County should not implicate Fulton County as either an active or passive participant in the discriminatory practices engaged in by private contractors or vendors seeking to obtain contracts with Fulton County.

Implementation of Equal Employment Opportunity (EEO) Policy

The County effectuates Equal Employment Opportunity thru Policy #800-8, Non-Discrimination in Contracting and Procurement. This policy considers racial and gender workforce availability. The availability of each workgroup is derived from the work force demographics set forth in the 2000 Census EEO file prepared by the United States Department of Commerce for the applicable labor pool normally utilized for the contract.

Monitoring of EEO Policy

Upon award of a contract with Fulton County, the successful bidder/proposer must complete an Equal Employment Opportunity Report (EEOR), describing the racial and gender make-up of the firm's work force. If the EEOR indicates that the firm's demographic composition indicates underutilization of employee's of a particular ethnic group for each job category, the firm will be required to submit an aggressive action plan setting forth steps the firm will take to address the identified underutilization.

6.2 EQUAL BUSINESS OPPORTUNITY PLAN (EBO PLAN)

In addition to the proposal submission requirements, each vendor **must** submit an Equal Business Opportunity Plan (EBO Plan) with their bid/proposal. The EBO Plan is designed to enhance the utilization of a particular racial, gender or ethnic group by a bidder/proposer, contractor, or vendor or by Fulton County. The respondent **must** outline a plan of action to encourage and achieve diversity and equality in the available procurement and contracting opportunities with *this solicitation*.

The EBO Plan **must** identify and include:

1. Potential opportunities within the scope of work of *this solicitation* that will allow for participation of racial, gender or ethnic groups.

-
2. Efforts that will be made by the bidder/proposer to encourage and solicit minority and female business utilization in *this solicitation*.

Fulton County encourages joint ventures, teaming, partnering and mentor-protégé relationships with minority and female businesses in an effort to achieve contracting and procurement diversity.

Prompt Payment: The prime contractor **must** certify in writing and **must** document all subcontractors, sub-consultants and suppliers have been promptly paid for work and materials, (less any retainage by the prime contractor prior to receipt of any further progress payments). In the event the prime contractor is unable to pay subcontractors, sub-consultants or suppliers until it has received a progress payment from Fulton County, the prime contractor shall pay all subcontractors, sub-consultants or suppliers funds due from said progress payment within forty-eight (48) hours of receipt of payment from Fulton County. In no event shall a subcontractor, sub-consultant or supplier be paid later than fifteen (15) days as provided for by state law.

6.3 DETERMINATION OF GOOD FAITH EFFORTS

During the course of the project, the Prime Contractor shall demonstrate that they have made all efforts reasonably possible to ensure that Minority and Female Business Enterprises (MFBE) have had a full and fair opportunity to compete and win subcontracts on this project. The Prime Contractor is required to include all outreach attempts that would demonstrate a "Good Faith Effort" in the solicitation of sub-consultants/subcontractors.

Written documentation demonstrating the Prime Contractor's outreach efforts to identify, contact, contract with or utilize Minority or Female owned businesses shall include holding pre-bid conferences, publishing advertisements in general circulation media, trade association publications, minority-focused media, and the County's bid board, as well as other efforts.

Include a list of publications where the advertisement was placed as well as a copy of the advertisement. Advertisement shall include at a minimum, scope of work, project location, location(s) of where plans and specifications may be viewed or obtained and trade or scopes of work for which subcontracts are being solicited.

6.4 REQUIRED FORMS AND EBO PLAN

In order to be compliant with the intent and provisions of the Fulton County Non-Discrimination in Purchasing and Contracting Ordinance (99-0960), bidders/proposers **must** submit the following completed documents. Failure to provide this information **shall** result in the proposal being deemed non-responsive.

- Exhibit A – Promise of Non-Discrimination
- Exhibit B – Employment Report

-
- Exhibit C – Schedule of Intended Subcontractor Utilization
 - Exhibit D – Letter of Intent to Perform as a Subcontractor or Provide Materials or Services
 - Exhibit E – Declaration Regarding Subcontractors Practices
 - Exhibit F – Joint Venture Disclosure Affidavit
 - Equal Business Opportunity Plan (EBO Plan). This document is not a form rather a statement created by the bidder/proposer on its company letter head addressing the EBO Plan requirements.
 - Exhibit H – First Source Jobs Program Information, Form 2

The following document must be completed as instructed if awarded the project:

- Exhibit G – Prime Contractor’s Subcontractor Utilization Report
- Exhibit H – First Source Jobs Program Agreement, Form 3

All Contract Compliance documents (Exhibits A – H and EBO Plan) are to be placed in a **separate sealed envelope** clearly marked “Contract Compliance”. The EBO Plan must be submitted on company letterhead. These documents are considered part of and should be submitted with the Technical Proposal.

EXHIBIT A – PROMISE OF NON-DISCRIMINATION

“Know all persons by these presents, that I/We (_____),
Name

_____ Title Firm Name
Hereinafter “Company”, in consideration of the privilege to bid on or obtain contracts funded, in whole or in part, by Fulton County, hereby consent, covenant and agree as follows:

- 1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin or gender in connection with any bid submitted to Fulton County for the performance of any resulting there from,
- 2) That it is and shall be the policy of this Company to provide equal opportunity to all businesses seeking to contract or otherwise interested in contracting with this Company without regard to the race, color, gender or national origin of the ownership of this business,
- 3) That the promises of non-discrimination as made and set forth herein shall be continuing in nature and shall remain in full force and effect without interruption,
- 4) That the promise of non-discrimination as made and set forth herein shall be made a part of, and incorporated by reference into, any contract or portion thereof which this Company may hereafter obtain,
- 5) That the failure of this Company to satisfactorily discharge any of the promises of non-discrimination as made and set forth herein shall constitute a material breach of contract entitling the Board to declare the contract in default and to exercise any and all applicable rights and remedies, including but not limited to cancellation of the contract, termination of the contract, suspension and debarment from future contracting opportunities, and withholding and/or forfeiture of compensation due and owing on a contract; and
- 6) That the bidder shall provide such information as may be required by the Director of Contract Compliance pursuant to Section 4.4 of the Fulton County Non-Discrimination in Purchasing and Contracting Ordinance.

SIGNATURE: _____

ADDRESS: _____

TELEPHONE NUMBER: _____

EMAIL ADDRESS: _____

EXHIBIT B – EMPLOYMENT REPORT

The demographic employment make-up for the bidder must be identified and submitted with this bid/proposal. In addition, if subcontractors complete this project, then the demographic employment make-up of the subcontractor(s) must be identified and submitted with this bid/proposal.

JOB CATEGORIES	TOTAL EMPLOYED		TOTAL MINORITIES		WHITE (Not Hispanic Origin)		BLACK or AFRICAN AMERICAN (Not of Hispanic Origin)		HISPANIC or LATINO		AMERICAN INDIAN, ALASKA NATIVE (AIAN)	
	M	F	M	F	M	F	M	F	M	F	M	F
EXECUTIVE/SENIOR LEVEL OFFICIALS and MANAGERS												
FIRST/MID LEVEL OFFICIALS and MANAGERS												
PROFESSIONALS												
TECHNICIANS												
SALES WORKERS												
ADMINISTRATIVE SUPPORT WORKERS												
CRAFT WORKERS												
OPERATIVES												
LABORERS & HELPERS												
SERVICE WORKERS												
TOTAL												

FIRMS'S NAME _____

ADDRESS _____

TELEPHONE _____

This completed form is for (Check only one): _____

Bidder/Proposer

Submitted by: _____

Date _____

EMAIL ADDRESS: _____

EXHIBIT C - SCHEDULE OF INTENDED SUBCONTRACTOR UTILIZATION

If the bidder/proposer intends to subcontract any portion of this scope of work/service(s), this form **must be** completed and **submitted with the bid/proposal**. All prime bidders/proposers **must** include Letter(s) of Intent (Exhibit D) in the bid document for all subcontractors who will be utilized under the scope of work/services.

Prime Bidder/Proposer: _____

ITB/RFP Number: _____ **12RFP84836B-BL** _____

Project Name or Description of Work/Service(s): _____

1. My firm, as Prime Bidder/Proposer on this scope of work/service(s) is _____ is not _____ a minority or female owned and controlled business enterprise. (Please indicate below the portion of work, including, percentage of bid/proposal amount that your firm will carry out directly):

2. If the Prime Bidder/Proposer is a Joint Venture, please complete Exhibit F: Joint Venture Disclosure Affidavit and attach a copy of the executed Joint Venture Agreement.

3. Sub-Contractors (including suppliers) to be utilized in the performance of this scope of work/service(s), if awarded, are:

SUBCONTRACTOR NAME: _____

ADDRESS: _____

PHONE: _____

CONTACT PERSON: _____

ETHNIC GROUP*: _____ **COUNTY CERTIFIED**** _____

WORK TO BE PERFORMED: _____

DOLLAR VALUE OF WORK: \$ _____ **PERCENTAGE VALUE:** _____ %

***Ethnic Groups: African American (AABE); Asian American (ABE); Hispanic American (HBE); Native American (NABE); White Female American (WFBE); **If yes, please attach copy of recent certification.**

SUBCONTRACTOR NAME: _____
ADDRESS: _____

PHONE: _____
CONTACT PERSON: _____
ETHNIC GROUP*: _____ COUNTY CERTIFIED** _____
WORK TO BE PERFORMED: _____

DOLLAR VALUE OF WORK: \$ _____ PERCENTAGE VALUE: _____ %

SUBCONTRACTOR NAME: _____
ADDRESS: _____

PHONE: _____
CONTACT PERSON: _____
ETHNIC GROUP*: _____ COUNTY CERTIFIED** _____
WORK TO BE PERFORMED: _____

DOLLAR VALUE OF WORK: \$ _____ PERCENTAGE VALUE: _____ %

SUBCONTRACTOR NAME: _____
ADDRESS: _____

PHONE: _____
CONTACT PERSON: _____
ETHNIC GROUP*: _____ COUNTY CERTIFIED** _____
WORK TO BE PERFORMED: _____

DOLLAR VALUE OF WORK: \$ _____ PERCENTAGE VALUE: _____ %

SUBCONTRACTOR NAME: _____
ADDRESS: _____

PHONE: _____
CONTACT PERSON: _____
ETHNIC GROUP*: _____ COUNTY CERTIFIED** _____
WORK TO BE PERFORMED: _____

DOLLAR VALUE OF WORK: \$ _____ PERCENTAGE VALUE: _____ %

***Ethnic Groups: African American (AABE); Asian American (ABE); Hispanic American (HBE); Native American (NABE); White Female American (WFBE); **If yes, please attach copy of recent certification.**

Total Dollar Value of Subcontractor Agreements: (\$)

Total Percentage Value: (%)

CERTIFICATION: The undersigned certifies that he/she has read, understands and agrees to be bound by the Bid/Proposer provisions, including the accompanying Exhibits and other terms and conditions regarding sub-contractor utilization. The undersigned further certifies that he/she is legally authorized by the Bidder/Proposer to make the statement and representation in this Exhibit and that said statements and representations are true and correct to the best of his/her knowledge and belief. The undersigned understands and agrees that if any of the statements and representations are made by the Bidder/Proposer knowing them to be false, or if there is a failure of the intentions, objectives and commitments set forth herein without prior approval of the County, then in any such event the Contractor's acts or failure to act, as the case may be, shall constitute a material breach of the contract, entitling the County to terminate the Contract for default. The right to so terminate shall be in addition to, and in lieu of, any other rights and remedies the County may have for other defaults under the contract.

Signature: _____ **Title:** _____

Firm or Corporate Name: _____

Address: _____

Telephone: () _____

Fax Number: () _____

Email Address: _____

EXHIBIT D

**LETTER OF INTENT TO PERFORM AS A SUBCONTRACTOR
OR
PROVIDE MATERIALS OR SERVICES**

This form **must** be completed by **ALL** known subcontractor and submitted with the bid/proposal. The Prime Contractor **must** submit Letters of Intent for **ALL** known subcontractors at time of bid submission.

To: _____
(Name of Prime Contractor Firm)

From: _____
(Name of Subcontractor Firm)

ITB/RFP Number: _____

Project Name: _____

The undersigned is prepared to perform the following described work or provide materials or services in connection with the above project (specify in detail particular work items, materials, or services to be performed or provided):

Description of Work	Project Commence Date	Project Completion Date	Estimated Dollar Amount

(Prime Bidder)

(Subcontractor)

Signature _____

Signature _____

Title _____

Title _____

Date _____

Date _____

Email Address _____

Email Address _____

EXHIBIT E - DECLARATION REGARDING SUBCONTRACTING PRACTICES

If the bidder/proposer **does not intend to subcontract** any portion of the scope of work services(s), this form **must be** completed and submitted with the bid/proposal.

_____ hereby declares that it is my/our intent to
(Bidder)

perform 100% of the work required for _____
(ITB/RFP Number)

(Description of Work)

In making this declaration, the bidder/proposer states the following:

1. That the bidder/proposer does not customarily subcontract elements of this type project, and normally performs and has the capability to perform and will perform **all elements** of the work on this project with his/her own current work forces;
2. If it should become necessary to subcontract some portion of the work at a later date, the bidder/proposer will comply with all requirements of the County's Non-Discrimination Ordinance in providing equal opportunities to all firms to subcontract the work. The determination to subcontract some portion of the work at a later date shall be made in good faith and the County reserves the right to require additional information to substantiate a decision made by the bidder/proposer to subcontract work following the award of the contract. Nothing contained in this provision shall be employed to circumvent the spirit and intent of the County's Non-Discrimination Ordinances;
3. The bidder will provide, upon request, information sufficient for the County to verify Item Number one.

AUTHORIZED COMPANY REPRESENTATIVE

Name: _____ **Title:** _____ **Date:** _____

Signature: _____

Firm: _____

Address: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

EXHIBIT F - JOINT VENTURE DISCLOSURE AFFIDAVIT

ITB/RFP No. 12RFP84836B-BL

Project Name Lands Record Management System

This form must be completed and submitted with the bid/proposal if a joint venture approach is to be undertaken.

In order to evaluate the extent of small, minority and female business involvement being proposed by a Bidder/Proposer, certain relevant information must be provided prior to contract award. The information requested below is to clearly identify and explain the extent of small business participation in the proposed joint venture. All items must be properly addressed before the business entity can be evaluated.

1. Firms:

- 1) **Name of Business:** _____
Street Address: _____
Telephone No.: _____
Nature of Business: _____

- 2) **Name of Business:** _____
Street Address: _____
Telephone No.: _____
Nature of Business: _____

- 3) **Name of Business:** _____
Street Address: _____
Telephone No.: _____
Nature of Business: _____

NAME OF JOINT VENTURE (If applicable): _____

ADDRESS: _____

PRINCIPAL OFFICE: _____

OFFICE PHONE: _____

Note: Attach additional sheets as required

1. Describe the capital contributions by each joint venturer and accounting thereof.
2. Describe the financial controls of the joint venture, e.g., will a separate cost center be established? Which venturer will be responsible for keeping the books? How will the expense therefore be reimbursed? What is the authority of each joint venture to commit or obligate the order?
3. Describe any ownership, options for ownership, or loans between the joint ventures. Identify terms thereof.
4. Describe the estimated contract cash flow for each joint venturer.
5. To what extent and by whom will the on-site work be supervised?
6. To what extent and by whom will the administrative office be supervised?
7. Which joint venturer will be responsible for material purchases including the estimated cost thereof? How will the purchase be financed?
8. Which joint venturer will provide equipment? What is the estimated cost thereof? How will the equipment be financed?
9. Describe the experience and business qualifications of each joint venturer.
10. Submit a copy of all joint venture agreements and evidence of authority to do business in the State of Georgia as well as locally, to include all necessary business licenses.
11. Percent of Minority/Female Business Enterprises ownership by each joint venture in terms of profit and loss sharing: _____

12. The authority of each joint venturer to commit or obligate the other: _____

13. Number of personnel to be involved in project, their crafts and positions and whether they are employees of the Minority/Female Business Enterprises enterprise, the majority firm or the joint venture: _____

14. Identification of control and participation in venture; list those individuals who are responsible for day-to-day management and policy decision-maker, including, but not limited to, those with prime responsibility for areas designated below; (use additional sheets if necessary)

<u>Name</u>	<u>Race</u>	<u>Sex</u>	<u>Financial Decisions</u>	<u>Supervision Field Operation</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

In connection with any work that these firms, as a joint venture, might be authorized to perform in connection with above captioned contract, we each do hereby authorize representatives of the Fulton County Department of Contract Compliance, Departments of Purchasing and Contract Compliance, and Finance, under the direction of the County Manger's Office, to examine, from time to time, the books, records and files to the extent that such relate to this County project.

WE DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THE FOREGOING DOCUMENT ARE TRUE AND CORRECT, AND THAT WE ARE AUTHORIZED, ON BEHALF OF THE ABOVE FIRMS, TO MAKE THIS AFFIDAVIT AND GRANT THE ABOVE PRIVILEGE.

FOR _____
(Company)

Date: _____

(Signature of Affiant)

(Printed Name)

(Company)

Date: _____

(Signature of Affiant)

(Printed Name)

State of _____:

County of _____:

On this ____ day of _____, 2012, before me, appeared _____, the undersigned officer, personally appeared _____ known to me to be the person described in the foregoing Affidavit and acknowledges that he (she) executed the same in the capacity therein stated and for the purpose therein contained.

Should you have questions regarding any of the documents contained in Section 6, please feel free to contact the Office of Contract Compliance at (404) 763-6300, for further assistance.

EXHIBIT H

FULTON COUNTY FIRST SOURCE JOBS PROGRAM

STATEMENT OF POLICY:

It is the policy of Fulton County Government to provide employment opportunities to the citizens of Fulton County. This policy will apply to all contracts procured through the Department of Purchasing & Contract Compliance valued in excess of \$200,000. The Prime Contractor is expected to utilize the First Source Jobs Program to fill 50% of the entry level jobs which arise as a result of any project funded in whole or in part with County funds with residents of Fulton County.

PURPOSE:

The purpose of this policy is to create a pool of employable persons who are residents of Fulton County to be called upon as a source to fill jobs created as a result of any eligible project funded in whole or in part with County funds in order to provide stable economic opportunities for families throughout the County. The First Source Jobs Program will be implemented by the Department of Purchasing & Contract Compliance and the Office of Workforce Development.

MONITORING POLICY:

Upon execution of a contract with Fulton County Government, the First Source Jobs Agreement (FSJ Form 2) will become a part of the contract between the bidder/proposer and Fulton County Government. The First Source Jobs Program will be monitored during routine site visits by the Office of Contract Compliance along with the Office of Workforce Development.

FORM 1

FULTON COUNTY

First Source Jobs Program Information

Company Name: _____

Project Number: _____

Project Name: _____

The following entry-level positions will become available as a result of the above referenced contract with Fulton County.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Include a job description and all required qualifications for each position listed above.

Identify a company representative and contact phone number who will be responsible for coordinating with the First Source Jobs Program:

Company Representative: _____

Phone Number: _____

Email Address: _____

FORM 2

FULTON COUNTY
First Source Jobs Program Agreement

Awarded Contractor's Name: _____

Formal Contract Name: _____

RFP/ITB Number: _____

Contact Person: _____

Contact Phone: _____

The contractor listed above agrees to the following:

1. The contractor shall make a good faith effort to fill 50% of the entry level position(s) created by this project using the Fulton County First Source Jobs Program.
2. The contractor shall provide the applicable details of every entry level job in writing within the required form.
3. The contractor shall be expected to present documentation that confirms employment terms to both the employee and Fulton County.

The Office of Contract Compliance will assist with monitoring the participation of First Source Jobs Program employees during routine site visits and report findings to the Office of Workforce Development for confirmation and follow-up. The Office of Workforce Development shall notify the Director of Human Services and the Purchasing Agent of any determination of non-compliance with the requirements of this policy and recommend a resolution or action to be taken.

Upon a determination by the Purchasing Agent and the Director of Human Services that a contractor has failed to comply with any portion of this policy, the County may impose the following:

1. Ten percent (10%) of all future payments under the involved eligible project shall be entitled to be withheld from a contractor that has violated this policy until the contractor complies with the provisions of this policy.

The undersigned agrees to the terms and conditions set forth in this agreement.

Contractor's Official Title: _____ Date: _____

Contractor's Name: _____

Contractor's Signature: _____

FORM 3

**Insurance and Risk Management Provisions
Information Technology**

It is Fulton County Government's practice to obtain Certificates of Insurance from our Contractors and Vendors. Insurance must be written by a licensed agent in a company licensed to write insurance in the State of Georgia, with an A.M. Best rating of at least A- VI, subject to final approval by Fulton County. Respondents shall submit with the bid/proposal evidence of insurability satisfactory to Fulton County Government as to form and content. Either of the following forms of evidence is acceptable:

- A letter from an insurance carrier stating that upon your firm/company being the successful Bidder/Respondent that a Certificate of Insurance shall be issued in compliance with the Insurance and Risk Management Provisions outlined below.
- A Certificate of Insurance complying with the Insurance and Risk Management Provisions outlined below (Request for Bid/Proposal number and Scope of Services must appear on the Certificate of Insurance).
- A combination of specific policies written with an umbrella policy covering liabilities in excess of the required limits is acceptable to achieve the applicable insurance coverage levels.

Upon award, the Contractor/Vendor must maintain at their expense, insurance with policy limits equal to or greater than the limits described below. Proof of insurance must be provided to Fulton County Government prior to the start of any activities/services as described in the bid document(s). Any and all Insurance Coverage(s) and Bonds required under the terms and conditions of the contract shall be maintained during the entire length of the contract, including any extensions or renewals thereto, and until all work has been completed to the satisfaction of Fulton County Government.

Accordingly the Respondent shall provide a certificate evidencing the following:

**1. WORKERS COMPENSATION/EMPLOYER’S LIABILITY INSURANCE – STATUTORY
(In compliance with the Georgia Workers Compensation Acts and any other State or Federal Acts or Provisions in which jurisdiction may be granted)**

Employer’s Liability Insurance	BY ACCIDENT	EACH ACCIDENT	\$100,000
Employer’s Liability Insurance	BY DISEASE	POLICY LIMIT	\$500,000
Employer’s Liability Insurance	BY DISEASE	EACH EMPLOYEE	\$100,000

2. COMMERCIAL GENERAL LIABILITY INSURANCE (Including contractual Liability Insurance)

Bodily Injury and Property Damage Liability	Each Occurrence	\$1,000,000
(Other than Products/Completed Operations)	General Aggregate	\$2,000,000
Products\Completed Operation	Aggregate Limit	\$2,000,000
Personal and Advertising Injury	Limits	\$1,000,000
Fire Damage	Limits	\$ 100,000

To include Designated Per Project/Location Endorsement #CG2503/CG2504

3. BUSINESS AUTOMOBILE LIABILITY INSURANCE

Combined Single Limits	Each Occurrence	\$500,000
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(Including operation of non-owned, owned, and hired automobiles).

SECTION 7

- 4. UMBRELLA LIABILITY**
(In excess of above noted coverages) Each Occurrence \$1,000,000
- 5. ELECTRONIC DATA PROCESSING LIABILITY and CYBERSPACE/ONLINE LIABILITY**
(Required if computer contractor) Limits \$1,000,000
Completed Operations – Statute of Repose for state of GA
- 6. ELECTRONIC ERRORS & OMISSION LIABILITY** Each Occurrence \$1,000,000
(To be provided when the Contract includes specified Professional Services, and will include Errors and Omissions coverage.
Completed Operations – Statute of Repose for state of GA
- 7. FIDELITY BOND, and CRIME to include COMPUTER FRAUD**
(Employee Dishonesty) (Theft) Each Occurrence \$100,000
Above to include 3rd Party Coverage

Certificates of Insurance

Certificates shall state that the policy or policies shall not expire, be cancelled or altered without at least sixty (60) days prior written notice to Fulton County Government. Policies and Certificates of Insurance are to list Fulton County Government as an Additional Insured (except for Workers' Compensation) and shall conform to all terms and conditions (including coverage of the indemnification and hold harmless agreement) contained in the Insurance and Risk Management Provisions. The General Liability Additional Insured language should apply to on-going and completed-operations, using ISO form CG 2010 (11/85 version) or equivalent.

The Contractor agrees to name the Owner and all other parties required of the Contractor/Vendor shall be included as insureds on the CGL, using ISO Additional Insured Endorsement forms CG 2010 11/85 or its equivalent coverage to the additional insureds. This insurance for the additional insureds shall be as broad as the coverage provided for the named insured Subcontractor. It shall apply as Primary Insurance before any other insurance or self-insurance, including any deductible, non-contributory, and Waiver of Subrogation provided to the Additional Insureds.

Additional Insured under the General Liability, Auto Liability, Umbrella Policies (with exception of Workers Compensation and Professional Liability), with no Cross Suits exclusion.

If Fulton County Government shall so request, the Respondent, Contractor or Vendor will furnish the County for its inspection and approval such policies of insurance with all endorsements, or confirmed specimens thereof certified by the insurance company to be true and correct copies.

Such certificates and notices **must** identify the "Certificate Holder" as follows:

Fulton County Government – Department of Purchasing & Contract Compliance
130 Peachtree Street, S.W.
Suite 1168
Atlanta, Georgia 30303-3459

SECTION 7

Certificates **must** list Project Name (where applicable).

Important:

It is understood that **Insurance in no way Limits the Liability of the Contractor/Vendor.**

USE OF PREMISES

Contractor/Vendor shall confine its apparatus, the storage of materials and the operations of its workers to limits/requirements indicated by law, ordinance, permits and any restrictions of Fulton County Government and shall not unreasonably encumber the premises with its materials.

PROTECTION OF PROPERTY

Contractor/Vendor will adequately protect its own work from damage, will protect Fulton County Government's property from damage or loss and will take all necessary precautions during the progress of the work to protect all persons and the property of others from damage or loss.

Contractor/Vendor shall take all necessary precautions for the safety of employees of the work and shall comply with all applicable provisions of the Federal, State and local safety laws and building codes to prevent accidents or injury to persons on, about, or adjacent to the premises where work is being performed.

Contractor/Vendor shall erect and properly maintain at all times as required by the conditions and progress of the work, all necessary safeguards for the protection of its employees, Fulton County Government employees and the public and shall post all applicable signage and other warning devices to protect against potential hazards for the work being performed.

INDEMNIFICATION AND HOLD HARMLESS AGREEMENT

To the fullest extent permitted by Law, Contractor/Vendor hereby agrees to release, indemnify, defend and hold harmless Fulton County, its Commissioners, officers, employees, subcontractors, successors, assigns and agents, from and against any and all losses (including death), claims, damages, liabilities, costs and expenses (including but not limited to all actions, proceedings, or investigations in respect thereof and any costs of judgments, settlements, court costs, attorney's fees or expenses, regardless of the outcome of any such action, proceeding, or investigation), caused by, relating to, based upon or arising out of any act or omission by Contractor/Vendor, its directors, officers, employees, subcontractors, successors, assigns or agents, or otherwise in connection (directly or indirectly) with its acceptance, or the performance, or nonperformance, of its obligations under these agreements. Such obligations shall not be construed to negate, abridge or otherwise reduce any other rights or obligations of indemnity which would otherwise exist as to any party or person as set forth in this paragraph.

Contractor/Vendor's obligation to protect, defend, indemnify and hold harmless, as set forth hereinabove, shall also include, but is not limited to, any matter arising out of any actual or alleged infringement of any patent, trademark, copyright, or service mark, or other actual or

SECTION 7

alleged unfair competition disparagement of product or service, or other tort or any type whatsoever, or any actual or alleged violation of trade regulations.

Contractor/Vendor further agrees to protect, defend, indemnify and hold harmless Fulton County, its Commissioners, officers, employees, subcontractors, successors, assigns and agents from and against any and all claims or liability for compensation under the Worker's Compensation Act, Disability Benefits Act, or any other employee benefits act arising out of injuries sustained by any employees of Contractor/Vendor. These indemnities shall not be limited by reason of the listing of any insurance coverage.

If the bid/quotation involves construction services Contractor/Vendor will be responsible fully for any and all damage to the work during the course of construction, until the point of Final acceptance by Fulton County.

FULTON COUNTY ACKNOWLEDGES THAT ALL PROVISIONS OF THIS INDEMNITY AGREEMENT MAY NOT BE APPLICABLE TO THE CONTRACTOR/VENDOR'S BUSINESS. TO THE EXTENT THAT CONTRACTOR/VENDOR MAY DEMONSTRATE SUCH NONAPPLICABILITY, FULTON COUNTY MAY NEGOTIATE AMENDMENTS TO THIS AGREEMENT AS THE CIRCUMSTANCES DICTATE.

CONTRACTOR/VENDOR ACKNOWLEDGES HAVING READ, UNDERSTANDING, AND AGREEING TO COMPLY WITH THIS INDEMNIFICATION AND HOLD HARMLESS AGREEMENT, AND THE REPRESENTATIVE OF THE CONTRACTOR/VENDOR IDENTIFIED BELOW IS AUTHORIZED TO SIGN CONTRACTS ON BEHALF OF THE RESPONDING CONTRACTOR/VENDOR.

COMPANY: _____ SIGNATURE: _____

NAME: _____ TITLE: _____

DATE: _____

**SECTION 8
PROFESSIONAL SERVICES SAMPLE CONTRACT**

SAMPLE CONTRACT



FULTON COUNTY

Vision
People Families Neighborhoods

Mission
To serve, protect and govern in concert with local municipalities

Values
People Customer Services
Ethics Resource Management
Innovation Equal Opportunity

CONTRACT DOCUMENTS FOR

12RFP84836B-BL

LANDS RECORD MANAGEMENT SYSTEM

For

CLERK OF SUPERIOR COURT

Index of Articles

- ARTICLE 1. CONTRACT DOCUMENTS
- ARTICLE 2. SEVERABILITY
- ARTICLE 3. DESCRIPTION OF PROJECT
- ARTICLE 4. SCOPE OF WORK
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- ARTICLE 6. SERVICES PROVIDED BY COUNTY
- ARTICLE 7. MODIFICATIONS/CHANGE ORDERS
- ARTICLE 8. SCHEDULE OF WORK
- ARTICLE 9. CONTRACT TERM
- ARTICLE 10. COMPENSATION AND PAYMENT FOR CONSULTANT SERVICES
- ARTICLE 11. PERSONNEL AND EQUIPMENT
- ARTICLE 12. SUSPENSION OF WORK
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- ARTICLE 37. FORCE MAJEURE
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Exhibits

- EXHIBIT A: GENERAL CONDITIONS
- EXHIBIT B: SPECIAL CONDITIONS
- EXHIBIT C: SCOPE OF WORK
- EXHIBIT D: PROJECT DELIVERABLES
- EXHIBIT E: COMPENSATION
- EXHIBIT F: PURCHASING FORMS
- EXHIBIT G: CONTRACT COMPLIANCE FORMS
- EXHIBIT H: INSURANCE AND RISK MANAGEMENT FORMS

APPENDICES

- APPENDIX 1: POLICY 800-6, PROCEDURES FOR HANDLING CHANGE ORDERS

CONTRACT AGREEMENT

Consultant: *[Insert Consultant Name]*
Contract No.: *[Insert Project Number and Title]*
Address: *[Insert Consultant Address]*
City, State
Telephone: *[Insert Consultant telephone #]*
Email: *[Insert Consultant Email]*
Contact: *[Insert Consultant Contact Name]*
[Insert Consultant Contact Title]

This Agreement made and entered into effective the _____ day of _____, 20____ by and between **FULTON COUNTY, GEORGIA**, a political subdivision of the State of Georgia, hereinafter referred to as “**County**”, and **[Insert Consultant Company Name]**, hereinafter referred to as “**Consultant**”, authorized to transact business in the State of Georgia.

WITNESSETH

WHEREAS, County through its *[Insert User Department Name]* hereinafter referred to as the “**Department**”, desires to retain a qualified and experienced Consultant to perform *[Insert project description/services to be provided]*, hereinafter, referred to as the “**Project**”.

WHEREAS, Consultant has represented to County that it is experienced and has qualified and local staff available to commit to the Project and County has relied upon such representations.

NOW THEREFORE, for and in consideration of the mutual covenants contained herein, and for other good and valuable consideration, County and Consultant agree as follows:

ARTICLE 1. CONTRACT DOCUMENTS

County hereby engages Consultant, and Consultant hereby agrees, to perform the services hereinafter set forth in accordance with this Agreement, consisting of the following contract documents:

- I. Form of Agreement;
- II. Addenda;
- III. Exhibit A: General Conditions;
- IV. Exhibit B: Special Conditions [where applicable];

- V. Exhibit C: Scope of Work
- VI. Exhibit D: Project Deliverables;
- VII. Exhibit E: Compensation;
- VIII. Exhibit F: Purchasing Forms
- IX. Exhibit G: Office of Contract Compliance Forms;
- X. Exhibit H: Insurance and Risk Management Forms
- XI. Appendix 1: Policy 800-6, Procedure for Handling Change Orders

The foregoing documents constitute the entire Agreement of the parties pertaining to the Project hereof and is intended as a complete and exclusive statement of promises, representations, discussions and agreements oral or otherwise that have been made in connection therewith. No modifications or amendment to this Agreement shall be binding upon the parties unless the same is in writing, conforms to Fulton County Policy and Procedure 800-6 governing change orders, is signed by the County's and the Consultant's duly authorized representatives, and entered upon the meeting minutes of the Fulton County Board of Commissioners.

If any portion of the Contract Documents shall be in conflict with any other portion, the various documents comprising the Contract Documents shall govern in the following order of precedence: 1) the Agreement, 2) the RFP, 3) any Addenda, 4) change orders, 5) the exhibits, and 6) portions of Consultant's proposal that was accepted by the County and made a part of the Contract Documents.

The Agreement was approved by the Fulton County Board of Commissioners on **[Insert Board of Commissioners approval date and item number]**.

ARTICLE 2. SEVERABILITY

If any provision of this Agreement is held to be unenforceable for any reason, the unenforceability thereof shall not affect the remainder of the Agreement, which shall remain in full force and effect, and enforceable in accordance with its terms.

ARTICLE 3. DESCRIPTION OF PROJECT

County and Consultant agree the Project is to perform **[Insert project description]**. All exhibits referenced in this agreement are incorporated by reference and constitute an integral part of this Agreement as if they were contained herein.

ARTICLE 4. SCOPE OF WORK

Unless modified in writing by both parties in the manner specified in the agreement, duties of Consultant shall not be construed to exceed those services specifically set forth herein. Consultant agrees to provide all services, products,

and data and to perform all tasks described in Exhibit C, Scope of Work.

ARTICLE 5. DELIVERABLES

Consultant shall deliver to County all reports prepared under the terms of this Agreement that are specified in Exhibit D, Project Deliverables. Consultant shall provide to County all deliverables specified in Exhibit D, Project Deliverables. Deliverables shall be furnished to County by Consultant in a media of form that is acceptable and usable by County at no additional cost at the end of the project.

ARTICLE 6. SERVICES PROVIDED BY COUNTY

Consultant shall gather from County all available non-privileged data and information pertinent to the performance of the services for the Project. Certain services as described in Exhibit C, Scope of Work, if required, will be performed and furnished by County in a timely manner so as not to unduly delay Consultant in the performance of said obligations. County shall have the final decision as to what data and information is pertinent.

County will appoint in writing a County authorized representative with respect to work to be performed under this Agreement until County gives written notice of the appointment of a successor. The County's authorized representative shall have complete authority to transmit instructions, receive information, and define County's policies, consistent with County rules and regulations. Consultant may rely upon written consents and approvals signed by County's authorized representative that are consistent with County rules and regulations.

ARTICLE 7. MODIFICATIONS

If during the course of performing the Project, County and Consultant agree that it is necessary to make changes in the Project as described herein and referenced exhibits, such changes will be incorporated by written amendments in the form of Change Orders to this Agreement. Any such Change Order and/or supplemental agreement shall not become effective or binding unless approved by the Board of Commissioners and entered on the minutes. Such modifications shall conform to the requirements of Fulton County Policy 800-6, specified in Appendix 1.

ARTICLE 8. SCHEDULE OF WORK

Consultant shall not proceed to furnish such services and County shall not become obligated to pay for same until a written authorization to proceed (Notice to Proceed) has been sent to Consultant from County. The Consultant shall begin work under this Agreement no later than five (5) days after the effective date of notice to proceed.

ARTICLE 9. CONTRACT TERM

[Insert contract term and any renewal options] Make sure the contract term matches the contract term in the solicitation document exactly.

ARTICLE 10. COMPENSATION

Compensation for work performed by Consultant on Project shall be in accordance with the payment provisions and compensation schedule, attached as Exhibit E, Compensation.

The total contract amount for the Project shall not exceed ***[Insert amount approved by BOC]***, which is full payment for a complete scope of work/services.

ARTICLE 11. PERSONNEL AND EQUIPMENT

Consultant shall designate in writing a person(s) to serve as its authorized representative(s) who shall have sole authority to represent Consultant on all manners pertaining to this contract.

Consultant represents that it has secured or will secure, at its' own expense, all equipment and personnel necessary to complete this Agreement, none of whom shall be employees of or have any contractual relationship with County. All of the services required hereunder will be performed by Consultant under his supervision and all personnel engaged in the work shall be fully qualified and shall be authorized or permitted under law to perform such services.

Written notification shall be immediately provided to County upon change or severance of any of the authorized representative(s), listed key personnel or sub-consultant performing services on this Project by Consultant. No changes or substitutions shall be permitted in Consultant's key personnel or sub-consultant as set forth herein without the prior written approval of the County. Requests for changes in key personnel or sub-consultants will not be unreasonably withheld by County.

ARTICLE 12. SUSPENSION OF WORK

Suspension Notice: The County may by written notice to the Consultant, suspend at any time the performance of all or any portion of the services to be performed under this Agreement. Upon receipt of a suspension notice, the Consultant must, unless the notice requires otherwise:

- 1) Immediately discontinue suspended services on the date and to the extent specified in the notice;

- 2) Place no further orders or subcontracts for material, services or facilities with respect to suspended services, other than to the extent required in the notice; and
- 3) Take any other reasonable steps to minimize costs associated with the suspension.

Notice to Resume: Upon receipt of notice to resume suspended services, the Consultant will immediately resume performance under this Agreement as required in the notice.

ARTICLE 13. DISPUTES

Except as otherwise provided in this Agreement, any dispute concerning a question of fact arising under this contract which is not disposed of by agreement shall be decided by **[insert user department name]**. The representative shall reduce the decision to writing and mail or otherwise furnish a copy thereof to the Consultant. The Consultant shall have 30 days from date the decision is sent to appeal the decision to the County Manager or his designee by mailing or otherwise furnishing to the County Manager or designee, copy of the written appeal. The decision of the County Manager or his designee for the determination of such appeal shall be final and conclusive. Pending any final decision of a dispute hereunder, Consultant shall proceed diligently with performance of the Agreement and in accordance with the decision of the **[department]** designated representative.

ARTICLE 14. TERMINATION OF AGREEMENT FOR CAUSE

- (1) Either County or Consultant may terminate work under this Agreement in the event the other party fails to perform in accordance with the provisions of the Agreement. Any party seeking to terminate this Agreement is required to give thirty (30) days prior written notice to the other party.
- (2) Notice of termination shall be delivered by certified mail with receipt for delivery returned to the sender.
- (3) **TIME IS OF THE ESSENCE** and if the Consultant refuses or fails to perform the work as specified in Exhibit C, Scope of Work and maintain the scheduled level of effort as proposed, or any separable part thereof, with such diligence as will insure completion of the work within the specified time period, or any extension or tolling there of, or fails to complete said work within such time. The County may exercise any remedy available under law or this Agreement. Failure to maintain the scheduled level of effort as proposed or deviation from the aforesaid proposal without prior approval of County shall constitute cause for termination

- (4) The County may, by written notice to Consultant, terminate Consultant's right to proceed with the Project or such part of the Project as to which there has been delay. In such event, the County may take over the work and perform the same to completion, by contract or otherwise, and Consultant shall be required to provide all copies of finished or unfinished documents prepared by Consultant under this Agreement to the County as stated in Exhibit D, "Project Deliverables".
- (5) Consultant shall be entitled to receive compensation for any satisfactory work completed on such documents as reasonably determined by the County.
- (6) Whether or not the Consultant's right to proceed with the work has been terminated, the Consultant shall be liable for any damage to the County resulting from the Consultant's refusal or failure to complete the work within the specified time period, and said damages shall include, but not be limited to, any additional costs associated with the County obtaining the services of another Consultant to complete the project.

ARTICLE 15. TERMINATION FOR CONVENIENCE OF COUNTY

Notwithstanding any other provisions, the County may terminate this Agreement for its convenience at any time by a written notice to Consultant. If the Agreement is terminated for convenience by the County, as provided in this article, Consultant will be paid compensation for those services actually performed. Partially completed tasks will be compensated for based on a signed statement of completion to be submitted by Consultant which shall itemize each task element and briefly state what work has been completed and what work remains to be done.

If, after termination, it is determined that the Consultant was not in default, or that the default was excusable, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the government.

ARTICLE 16. WAIVER OF BREACH

The waiver by either party of a breach or violation of any provision of this Agreement, shall not operate or be construed to be, a waiver of any subsequent breach or violation of the same or other provision thereof.

ARTICLE 17. INDEPENDENT CONSULTANT

Consultant shall perform the services under this Agreement as an independent Consultant and nothing contained herein shall be construed to be inconsistent with such relationship or status. Nothing in this Agreement shall be interpreted or construed to constitute Consultant or any of its agents or employees to be the

agent, employee or representative of County.

ARTICLE 18. PROFESSIONAL RESPONSIBILITY

Consultant represents that it has, or will secure at its own expenses, all personnel appropriate to perform all work to be completed under this Agreement;

All the services required hereunder will be performed by Consultant or under the direct supervision of Consultant. All personnel engaged in the Project by Consultant shall be fully qualified and shall be authorized or permitted under applicable State and local law to perform such services.

None of the work or services covered by this Agreement shall be transferred, assigned, or subcontracted by Consultant without the prior written consent of the County.

ARTICLE 19. COOPERATION WITH OTHER CONSULTANTS

Consultant will undertake the Project in cooperation with and in coordination with other studies, projects or related work performed for, with or by County's employees, appointed committee(s) or other Consultants. Consultant shall fully cooperate with such other related Consultants and County employees or appointed committees. Consultant shall provide within his schedule of work, time and effort to coordinate with other Consultants under contract with County. Consultant shall not commit or permit any act, which will interfere with the performance of work by any other consultant or by County employees. Consultant shall not be liable or responsible for the delays of third parties not under its control nor affiliated with the Consultant in any manner.

ARTICLE 20. ACCURACY OF WORK

Consultant shall be responsible for the accuracy of his work and shall promptly correct its errors and omissions without additional compensation. Acceptance of the work by the County will not relieve Consultant of the responsibility of subsequent corrections of any errors and the clarification of any ambiguities. Consultant shall prepare any plans, report, fieldwork, or data required by County to correct its errors or omissions. The above consultation, clarification or correction shall be made without added compensation to Consultant. Consultant shall give immediate attention to these changes so there will be a minimum of delay to others.

ARTICLE 21. REVIEW OF WORK

Authorized representatives of County may at all reasonable times review and inspect Project activities and data collected under this Agreement and amendments thereto. All reports, drawings, studies, specifications, estimates, maps and computations prepared by or for Consultant, shall be available to

authorized representatives of County for inspection and review at all reasonable times in the main office of County. Acceptance shall not relieve Consultant of its professional obligation to correct, at its expense, any of its errors in work. County may request at any time and Consultant shall produce progress prints or copies of any work as performed under this Agreement. Refusal by Consultant to submit progress reports and/or plans shall be cause for County, without any liability thereof, to withhold payment to consultant until Consultant complies with County's request in this regard. County's review recommendations shall be incorporated into the plans by Consultant.

ARTICLE 22. INDEMNIFICATION

Consultant hereby agrees to release, indemnify, defend and hold harmless Fulton County, its Commissioners, officers, employees, sub-consultants, successors, assigns and agents, from and against any and all losses (including death), claims, damages, liabilities, costs and expenses (including but not limited to all actions, proceedings, or investigations in respect thereof and any costs of judgments, settlements, court costs, attorney's fees or expenses, regardless of the outcome of any such action, proceeding, or investigation), caused by, relating to, based upon or arising out of any act or omission by Consultant, its directors, officers, employees, sub-consultants, successors, assigns or agents, or otherwise in connection (directly or indirectly) with its acceptance, or the performance, or nonperformance, of its obligations under these agreements. Such obligations shall not be construed to negate, abridge or otherwise reduce any other rights or obligations of indemnity which would otherwise exist as to any party or person as set forth in this paragraph.

Consultant obligation to protect, defend, indemnify and hold harmless, as set forth hereinabove, shall also include, but is not limited to, any matter arising out of any actual or alleged infringement of any patent, trademark, copyright, or service mark, or other actual or alleged unfair competition disparagement of product or service, or other tort or any type whatsoever, or any actual or alleged violation of trade regulations.

Consultant further agrees to protect, defend, indemnify and hold harmless Fulton County, its Commissioners, officers, employees, sub-consultants, successors, assigns and agents from and against any and all claims or liability for compensation under the Worker's Compensation Act, Disability Benefits Act, or any other employee benefits act arising out of injuries sustained by any employees of Consultant. These indemnities shall not be limited by reason of the listing of any insurance coverage.

These indemnity provisions are for the protection of the County indemnities only and shall not establish, of themselves, any liability to third parties. The provisions of this article shall survive termination of this Agreement.

ARTICLE 23. CONFIDENTIALITY

Consultant agrees that its conclusions and any reports are for the confidential information of County and that it will not disclose its conclusions in whole or in part to any persons whatsoever, other than to submit its written documentation to County, and will only discuss the same with it or its authorized representatives, except as required under this Agreement to provide information to the public. Upon completion of this Agreement term, all documents, reports, maps, data and studies prepared by Consultant pursuant thereto and any equipment paid for by County as a result of this Agreement, shall become the property of County and be delivered to the **[insert user department name]**.

Articles, papers, bulletins, reports, or other materials reporting the plans, progress, analyses, or results and findings of the work conducted under this Agreement shall not be presented publicly or published without prior approval in writing of County.

It is further agreed that if any information concerning the Project, its conduct results, or data gathered or processed should be released by Consultant without prior approval from County, the release of the same shall constitute grounds for termination of this Agreement without indemnity to Consultant, but should any such information be released by County or by Consultant with such prior written approval, the same shall be regarded as Public information and no longer subject to the restrictions of this Agreement.

ARTICLE 24. OWNERSHIP OF INTELLECTUAL PROPERTY AND INFORMATION

Consultant agrees that Fulton County is the sole owner of all information, data, and materials that are developed or prepared subject to this Agreement. Consultant or any sub-consultant is not allowed to use or sell any information subject to this contract for educational, publication, profit, research or any other purpose without the written and authorized consent of the County. All electronic files used in connection to this Agreement, which are by definition, any custom software files used in connection to this Agreement, (collectively, the "Software"), shall be turned over to the County for its use after termination hereof and Consultant shall have no interest of any kind in such electronic files. Any required licenses and fees for the Software or other required materials shall be purchased and/or paid for by Consultant and registered in the name of the County, if possible. The Software as defined hereunder, specifically excludes all software, documentation, information, and materials in which Consultant has pre-existing proprietary rights and/or has otherwise been licensed to Consultant prior to this Agreement, and any upgrades, updates, modifications or enhancements thereto. Consultant agrees to provide at no cost to County any upgrades to any software used in connection with this Agreement which may be subsequently developed or upgraded for a period of three (3) years from the date of completion

of the work under the Agreement, except in the case of commercial Software licensed to the County. Any information developed for use in connection with this Agreement may be released as public domain information by the County at its sole discretion.

ARTICLE 25. COVENANT AGAINST CONTINGENT FEES

Consultant warrants that no person or selling agency has been employed or retained to solicit or secure this Agreement upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees maintained by Consultant for the purpose of securing business and that Consultant has not received any non-County fee related to this Agreement without the prior written consent of County. For breach or violation of this warranty, County shall have the right to annul this Agreement without liability or at its discretion to deduct from the Contract Price or consideration the full amount of such commission, percentage, brokerage or contingent fee.

ARTICLE 26. INSURANCE

Consultant agrees to obtain and maintain during the entire term of this Agreement, all of the insurance required as specified in the Agreement documents, Exhibit G, Insurance and Risk Management Forms, with the County as an additional insured and shall furnish the County a Certificate of Insurance showing the required coverage. The cancellation of any policy of insurance required by this Agreement shall meet the requirements of notice under the laws of the State of Georgia as presently set forth in the Georgia Code.

ARTICLE 27. PROHIBITED INTEREST

Section 27.01 Conflict of interest:

Consultant agrees that it presently has no interest and shall acquire no interest direct or indirect that would conflict in any manner or degree with the performance of its service hereunder. Consultant further agrees that, in the performance of the Agreement, no person having any such interest shall be employed.

Section 27.02 Interest of Public Officials:

No member, officer or employee of County during his tenure shall have any interest, direct or indirect, in this Agreement or the proceeds thereof.

ARTICLE 28. SUBCONTRACTING

Consultant shall not subcontract any part of the work covered by this Agreement or permit subcontracted work to be further subcontracted without prior written approval of County.

ARTICLE 29. ASSIGNABILITY

Consultant shall not assign or subcontract this Agreement or any portion thereof without the prior expressed written consent of County. Any attempted assignment or subcontracting by Consultant without the prior expressed written consent of County shall at County's sole option terminate this Agreement without any notice to Consultant of such termination. Consultant binds itself, its successors, assigns, and legal representatives of such other party in respect to all covenants, agreements and obligations contained herein.

ARTICLE 30. ANTI-KICKBACK CLAUSE

Salaries of engineers, surveyors, draftsmen, clerical and technicians performing work under this Agreement shall be paid unconditionally and not less often than once a month without deduction or rebate on any account except only such payroll deductions as are mandatory by law. Consultant hereby promises to comply with all applicable "Anti-Kickback" Laws, and shall insert appropriate provisions in all subcontracts covering work under this Agreement.

ARTICLE 31. AUDITS AND INSPECTORS

At any time during normal business hours and as often as County may deem necessary, Consultant shall make available to County and/or representatives of the County for examination all of its records with respect to all matters covered by this Agreement.

It shall also permit County and/or representative of the County to audit, examine and make copies, excerpts or transcripts from such records of personnel, conditions of employment and other data relating to all matters covered by this Agreement. Consultant's records of personnel, conditions of employment, and financial statements (hereinafter "Information") constitute trade secrets and are considered confidential and proprietary by Consultant. To the extent County audits or examines such Information related to this Agreement, County shall not disclose or otherwise make available to third parties any such Information without Consultant's prior written consent unless required to do so by a court order. Nothing in this Agreement shall be construed as granting County any right to make copies, excerpts or transcripts of such information outside the area covered by this Agreement without the prior written consent of Consultant. Consultant shall maintain all books, documents, papers, accounting records and other evidence pertaining to costs incurred on the Project and used in support of its proposal and shall make such material available at all reasonable times during the period of the Agreement and for eight years from the date of final payment under the Agreement, for inspection by County or any reviewing agencies and copies thereof shall be furnished upon request and at no additional cost to County. Consultant agrees that the provisions of this Article shall be included in any Agreements it may make with any sub-consultant, assignee or transferee.

ARTICLE 32. ACCOUNTING SYSTEM

Consultant shall have an accounting system, which is established, and maintaining in accordance with generally accepted accounting principles. Consultant must account for cost in a manner consistent with generally accepted accounting procedures, as approved by Fulton County.

ARTICLE 33. VERBAL AGREEMENT

No verbal agreement or conversation with any officer, agent or employee of County either before, during or after the execution of this Agreement, shall affect or modify any of the terms of obligations herein contained, nor shall such verbal agreement or conversation entitle Consultant to any additional payment whatsoever under the terms of this Agreement. All changes to this shall be in writing and the form of a change order in supplemental agreement, approved by the County, and entered on the Minutes of the Board of Commissioners.

ARTICLE 34. NOTICES

All notices shall be in writing and delivered in person or transmitted by certified mail, postage prepaid.

Notice to County, shall be addressed as follows:

[Insert User Department Representative Position for project]

[Insert User Department Address]

Atlanta, Georgia 30303

Telephone:

Email:

Attention: ***[Insert User Department Representative for project]***

With a copy to:

Department of Purchasing & Contract Compliance

Director

130 Peachtree Street, S.W., Suite 1168

Atlanta, Georgia 30303

Telephone: (404) 612-5800

Email: cecil.moore@fultoncountyga.gov

Attention: Cecil S. Moore

Notices to Consultant shall be addressed as follows:

[Insert Consultant Representative for project]

[Insert Consultant Address]

Telephone:

Email:
Attention: **[Insert Consultant Representative for project]**

ARTICLE 35. **JURISDICTION**

This Agreement will be executed and implemented in Fulton County. Further, this Agreement shall be administered and interpreted under the laws of the State of Georgia. Jurisdiction of litigation arising from this Agreement shall be in the Fulton County Superior Courts. If any part of this Agreement is found to be in conflict with applicable laws, such part shall be inoperative, null and void insofar as it is in conflict with said laws, but the remainder of this Agreement shall be in full force and effect.

Whenever reference is made in the Agreement to standards or codes in accordance with which work is to be performed, the edition or revision of the standards or codes current on the effective date of this Agreement shall apply, unless otherwise expressly stated.

ARTICLE 36. **EQUAL EMPLOYMENT OPPORTUNITY**

During the performance of this Agreement, Consultant agrees as follows:

Section 36.01 Consultant will not discriminate against any employee or applicant for employment because of race, creed, color, sex or national origin;

Section 36.02 Consultant will, in all solicitations or advertisements for employees placed by, or on behalf of, Consultant state that all qualified applicants, will receive consideration for employment without regard to race, creed, color, sex or national origin;

Section 36.03 Consultant will cause the foregoing provisions to be inserted in all subcontracts for any work covered by the Agreement so that such provision will be binding upon each sub-consultant, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

ARTICLE 37. **FORCE MAJEURE**

Neither County nor Consultant shall be deemed in violation of this Agreement if either is prevented from performing its obligations hereunder for any reason beyond its control, including but not limited to acts of God, civil or military authority, act of public enemy, accidents, fires, explosions, earthquakes, floods or catastrophic failures of public transportation, provided however, that nothing herein shall relieve or be construed to relieve Consultant from performing its obligations hereunder in the event of riots, rebellions or legal strikes.

ARTICLE 38. OPEN RECORDS ACT

The Georgia Open Records Act, O.C.G.A. Section 50-18-70 et seq., applies to this Agreement. The Consultant acknowledges that any documents or computerized data provided to the County by the Consultant may be subject to release to the public. The Consultant also acknowledges that documents and computerized data created or held by the Consultant in relation to the Agreement may be subject to release to the public, to include documents turned over to the County. The Consultant shall cooperate with and provide assistance to the County in rapidly responding to Open Records Act requests. The Consultant shall notify the County of any Open Records Act requests no later than 24 hours following receipt of any such requests by the Consultant. The Consultant shall promptly comply with the instructions or requests of the County in relation to responding to Open Records Act requests.

ARTICLE 39. CONSULTANT'S COMPLIANCE WITH ALL ASSURANCES OR PROMISES MADE IN RESPONSE TO PROCUREMENT

Where the procurement documents do not place a degree or level of service relating to the scope of work, M/FBE participation, or any other matter relating to the services being procured, should any Consultant submit a response to the County promising to provide a certain level of service for the scope of work, M/FBE participation, or any other matter, including where such promises or assurances are greater than what is required by the procurement documents, and should this response containing these promises or assurances be accepted by the County and made a part of the Contract Documents, then the degree or level of service promised relating to the scope of work, M/FBE participation, or other matter shall be considered to be a material part of the Agreement between the Consultant and the County, such that the Consultant's failure to provide the agreed upon degree or level of service or participation shall be a material breach of the Agreement giving the County just cause to terminate the Agreement for cause, pursuant to ARTICLE 14 of the Agreement.

ARTICLE 40. INVOICING AND PAYMENT

Consultant shall submit monthly invoices for work performed during the previous calendar month, in a form acceptable to the County and accompanied by all support documentation requested by the County, for payment and for services that were completed during the preceding phase. The County shall review for approval of said invoices. The County shall have the right not to pay any invoice or part thereof if not properly supported, or if the costs requested or a part thereof, as determined by the County, are reasonably in excess of the actual stage of completion.

Time of Payment: Invoices for payment shall be submitted to County by the first (1st) calendar day of the month to facilitate processing for payment in that same month. Invoices received after the first (1st) calendar day of the month may not

be paid until the last day of the following month. The County shall make payments to Consultant by U.S. mail approximately thirty (30) days after receipt of a proper invoice. Parties hereto expressly agree that the above contract term shall supersede the rates of interest, payment periods, and contract and subcontract terms provided for under the Georgia Prompt Pay Act, O.C.G.A. 13-11-1 et seq., pursuant to 13-11-7(b), and the rates of interest, payment periods, and contract and subcontract terms provided for under the Prompt Pay Act shall have no application to this Agreement; parties further agree that the County shall not be liable for any interest or penalty arising from late payments.

Submittal of Invoices: Consultant shall submit all invoices in original and one (1) copy to:

[Insert User Department Representative Position for project]

[Insert User Department Address]

Atlanta, Georgia 30303

Telephone:

Email:

Attention: **[Insert User Department Representative for project]**

Consultant's cumulative invoices shall not exceed the total not-to-exceed fee established for this Agreement.

Optional: [A narrative of one (1) page only, listing the scope of work/ services billed for shall accompany each invoice.]

County's Right to Withhold Payments: The County may withhold payments for services that involve disputed costs, involve disputed audits, or are otherwise performed in an inadequate fashion. Payments withheld by the County will be released and paid to the Consultant when the services are subsequently performed adequately and on a timely basis, the causes for disputes are reconciled or any other remedies or actions stipulated by the County are satisfied. The County shall promptly pay any undisputed items contained in such invoices.

Payment of Sub-consultants/Suppliers: The Consultant must certify in writing that all sub-consultants of the Consultant and suppliers have been promptly paid for work and materials and previous progress payments received. In the event the prime Consultant is unable to pay sub-consultants or suppliers until it has received a progress payment from Fulton County, the prime Consultant shall pay all sub-consultants or supplier funds due from said progress payments within forty-eight (48) hours of receipt of payment from Fulton County and in no event later than fifteen days as provided for by State Law.

Acceptance of Payments by Consultant; Release. The acceptance by the Consultant of any payment for services under this Agreement will, in each instance, operate as, and be a release to the County from, all claim and liability

to the Consultant for work performed or furnished for or relating to the service for which payment was accepted, unless the Consultant within five (5) days of its receipt of a payment, advises the County in writing of a specific claim it contends is not released by that payment.

ARTICLE 41. TAXES

The Consultant shall pay all sales, retail, occupational, service, excise, old age benefit and unemployment compensation taxes, consumer, use and other similar taxes, as well as any other taxes or duties on the materials, equipment, and labor for the work provided by the Consultant which are legally enacted by any municipal, county, state or federal authority, department or agency at the time bids are received, whether or not yet effective. The Consultant shall maintain records pertaining to such taxes as well as payment thereof and shall make the same available to the County at all reasonable times for inspection and copying. The Consultant shall apply for any and all tax exemptions which may be applicable and shall timely request from the County such documents and information as may be necessary to obtain such tax exemptions. The County shall have no liability to the Consultant for payment of any tax from which it is exempt.

ARTICLE 42. PERMITS, LICENSES AND BONDS

All permits and licenses necessary for the work shall be secured and paid for by the Consultant. If any permit, license or certificate expires or is revoked, terminated, or suspended as a result of any action on the part of the Consultant, the Consultant shall not be entitled to additional compensation or time.

ARTICLE 43. NON-APPROPRIATION

This Agreement states the total obligation of the County to the Consultant for the calendar year of execution. Notwithstanding anything contained in this Agreement, the obligation of the County to make payments provided under this Agreement shall be subject to annual appropriations of funds thereof by the governing body of the County and such obligation shall not constitute a pledge of the full faith and credit of the County within the meaning of any constitutional debt limitation. The Director of Finance shall deliver written notice to the Consultant in the event the County does not intend to budget funds for the succeeding Contract year.

Notwithstanding anything contained in this Agreement, if sufficient funds have not been appropriated to support continuation of this Agreement for an additional calendar year or an additional term of the Agreement, this Agreement shall terminate absolutely and without further obligation on the part of the County at the close of the calendar year of its execution and at the close of each succeeding calendar year of which it may be renewed, unless a shorter

termination period is provided or the County suspends performance pending the appropriation of funds.

ARTICLE 44. WAGE CLAUSE

Consultant shall agree that in the performance of this Agreement the Consultant will comply with all lawful agreements, if any, which the Consultant had made with any association, union, or other entity, with respect to wages, salaries, and working conditions, so as not to cause inconvenience, picketing, or work stoppage.

SAMPLE CONTRACT

IN WITNESS THEREOF, the Parties hereto have caused this Contract to be executed by their duly authorized representatives as attested and witnessed and their corporate seals to be hereunto affixed as of the day and year date first above written.

OWNER:

FULTON COUNTY, GEORGIA

CONSULTANT:

[Insert Consultant COMPANY NAME]

John H. Eaves, Commission Chair
Board of Commissioners

[Insert Name & Title of person authorized to sign contract]

ATTEST:

ATTEST:

Mark Massey
Clerk to the Commission (Seal)

Secretary/
Assistant Secretary

(Affix Corporate Seal)

APPROVED AS TO FORM:

Office of the County Attorney

APPROVED AS TO CONTENT:

[Insert Department Head Name]
[Insert Department Head Title]

ADDENDA

SAMPLE CONTRACT

EXHIBIT A
GENERAL CONDITIONS

SAMPLE CONTRACT

EXHIBIT B

SPECIAL CONDITIONS

SAMPLE CONTRACT

EXHIBIT C
SCOPE OF WORK

SAMPLE CONTRACT

EXHIBIT D

PROJECT DELIVERABLES

SAMPLE CONTRACT

EXHIBIT E
COMPENSATION

SAMPLE CONTRACT

EXHIBIT F
PURCHASING FORMS

SAMPLE CONTRACT

EXHIBIT G

OFFICE OF CONTRACT COMPLIANCE FORMS

SAMPLE CONTRACT

EXHIBIT H

INSURANCE AND RISK MANAGEMENT FORMS

APPENDIX 1

POLICY 800-6, PROCEDURES FOR HANDLING CHANGE ORDERS



POLICY AND PROCEDURE

SUBJECT: Procedures for Handling Change Orders

DATE: September 19, 2001

800-6

A. STATEMENT OF POLICY:

Fulton County is committed to a policy of open, non-discriminatory and competitive purchasing. When circumstances arise after award of a contract, requiring modification of that contract, such modification will be accomplished in accordance with this Change Order Policy and Procedure, to achieve the following goals:

- (1) Ensure that Fulton County does not pay more than is necessary to complete the contract;
- (2) Preclude a contractor from tendering the lowest bid and then increasing the cost of the contract through the change order process;
- (3) Ensure that the terms and conditions upon which the contract was awarded are met throughout the term of the contract, including any and all change orders;
- (4) Ensure that the change order procedure is not used to bypass the competitive bidding process; and
- (5) Ensure that change orders are not used for work that is independent of and outside the scope of the original contract.

B. BACKGROUND:

A change order is a written order from Fulton County to a contractor, directing a change within the scope of the contract and necessary for completion of the contract, in the specifications, services, time of performance or terms and conditions of the contract. A change is within the scope of a contract if it concerns the work required by the original contract documents and any subsequent change orders approved to accomplish the intent of the project as described in the solicitation documents.

A contractor is any person or entity, whether designated as a contractor, vendor, consultant or by any other title, having a contractual relationship with Fulton County. In Fulton County, except as otherwise provided in this Policy and Procedure, change orders shall be effected only through a written, bilateral agreement (Modification) between the County, acting through its Board of Commissioners, and the contractor. The Modification modifies the contract and will specify all changes to the contract and the costs thereof.

C. JUSTIFICATION FOR CHANGE ORDERS:

Change orders are authorized only for the following reasons:

- (1) Situations creating an immediate need to protect the public health, safety or welfare;
- (2) Corrections of deficiencies in design or construction documents provided by architects or engineers other than the contractor;
- (3) Changes in applicable laws or regulations, or changes that result from public participation when such participation is mandated by laws or regulations;
- (4) Concealed conditions, differing site conditions or abnormal inclement weather;
- (5) Owner requested changes within the scope of the original contract. Such changes may include: deductive change orders and accommodation of value engineering and administrative matters such as closeout change orders for unit price contracts, deductions for approved material substitutions and administrative no-cost change orders.

D. CHANGE ORDER AUTHORITY: Except as otherwise provided in this procedure, change orders may be approved only by the Board of Commissioners of Fulton County. Such approval shall be demonstrated by a formal vote on the Contract Modification.

E. CHANGE ORDER PROCEDURE: The ordinary sequence of a change order is as follows:

- (1) Need for contract change is identified.
- (2) Contractor is requested to propose price for change and if necessary, schedule changes.
- (3) Contractor and County negotiate price and scope of change.
- (4) Agreement between County and contractor for change is clearly defined in a written Modification.
- (5) Contractor signs Modification and returns it to County.
- (6) Modification is submitted to Board of Commissioners for approval and signature.

Circumstances may alter this general description of change order procedure. The administrative actions necessary to accomplish a change order are described in Section "F" of this Policy and Procedure.

- F. **ADMINISTRATIVE ACTIONS:** Department heads have primary responsibility for completion of the administrative steps necessary to complete a change order. Such responsibility may be exercised through designees and in consultation with other interested departments. Except for change orders falling under Section G, the following regular administrative procedures will govern all change orders:
- (1) The department head will confirm the necessity for and the appropriateness of a change order under this procedure.
 - (2) The department head will submit to the contractor a written description of the proposed change and request that the contractor submit a cost proposal. The written description must provide sufficient details of the change to permit the contractor to submit a realistic price.
 - (3) The department head, in conjunction with the Purchasing Agent, shall review the cost proposal for general reasonableness and compliance with applicable County purchasing policies.
 - (4) If appropriate and necessary, the department head may negotiate the cost and scope of the proposed change with the contractor.
 - (5) If agreement is reached with the contractor, the terms of the agreement shall be reduced to a written Contract Modification suitable for execution by the contractor and Fulton County. The Modification shall clearly describe the changes to the contract, including any changes to the schedule and the obligations of the parties. The Modification also shall clearly describe all elements of the cost of the changes, all previous change orders and the total change to the contract cost.
 - (6) The department head shall submit the proposed Modification to the County Attorney for preliminary review, and to the Purchasing Agent, the Director of Finance and the Director of Contract Compliance for their review. The department head shall attach to the Modification, the documents listed in Attachment 1 to this Procedure. When change order packages are submitted to the County Attorney's Office for review, the original contract and all previous change orders must be attached.
 - (7) Upon completion of the reviews, the department head shall make such changes to the proposed Modification and related documents as necessary and then shall submit five copies of the Modification to the contractor for execution.
 - (8) The Modification, as executed by the contractor, the explanatory memorandum and the Uniform Contract/Purchasing Sign-Off Sheet (Sign-Off Sheet) shall be submitted to the County Attorney's Office for final review, to include review of the formalities of execution by the contractor.
 - (9) The Modification and accompanying documentation shall be submitted to the County Manager for approval and placement on the Board of Commissioners' agenda. The County Manager shall ensure that all required reviews have been

completed and that all necessary documents are attached to the Modification. However, the County Manager may disapprove a change order and return it to the department head to have the work procured through the competitive process.

- (10) Following approval by the Board of Commissioners and receipt of the approval letter from the County Manager, the user department shall forward the originals (with a copy of the approval letter and the routing sheet) to the County Manager for execution. The County Manager shall forward the documents to the Chairman's Office for his/her signature. The Chairman's Office shall forward the documents to the Clerk to the Commission for his/her signature. The Clerk's Office shall retain one original for the file designated by the Board of Commissioners for filing contracts and making them available for public inspection, and shall forward one original to Purchasing and the remainder of the documents to the user department.
- (11) The user department shall distribute copies of the approved and signed Modifications as set out in Section H. The Purchasing Agent shall issue any necessary purchase order modifications to the contractor and the department concerned, and the department head shall issue to the contractor any necessary notices to proceed.

G. COUNTY MANAGER'S AUTHORITY: In the following described situations, the County Manager is authorized to approve change orders and authorize the commencement of work pursuant to such change orders, subject to ratification by the Board of Commissioners. The Board of Commissioners will not withhold ratification unless there is credible evidence showing that the contractor induced or procured the change order by fraud.

(1) Change orders less than 10% of original contract amount:

- (a) The County Manager is authorized to approve change orders having a total cost that is less than 10% of the original contract cost. A change order may be approved under this procedure if its cost, when combined with that of all previous change orders to the same contract, is an amount less than 10% of the original contract cost. The County Manager may decline to exercise this authority and return change orders for processing through the regular change order procedure, or may direct that the work be procured through the competitive process.
- (b) Change orders submitted under this authority shall be processed according to the regular administrative procedure described in the preceding Section F, up through Step (8).

The procedure thereafter shall be as follows, substituting the numbered steps below:

(9) The Modification and required documentation shall be submitted to the County Manager for approval. The County Manager shall review the documents for compliance with this Policy and Procedure and the completion of all required reviews. The County Manager may decline to exercise the authority to approve the change order and may either submit it to the Board of Commissioners under the regular administrative procedure or return it to the department head to procure the work through the competitive process.

(10) The County Manager shall document approval of the change order by signature on the Sign-Off Sheet and shall notify the user department and the Purchasing Agent of such approval. The department head and the Purchasing Agent shall issue any necessary notices to proceed and purchase order amendments. Work may proceed upon approval by the County Manager.

(11) Not more than sixty (60) days following approval of a change order under this authority, the County Manager shall have it spread on the minutes by placing it on the consent agenda and subsequently obtaining the signature of the Chairman of the Board of Commissioners on the Modification. The user department shall distribute copies of the executed Modification as stipulated under the regular procedure.

(2) Extraordinary Circumstances:

(a) The County Manager is authorized to approve change orders regardless of the amount when due to extraordinary circumstances, work must be implemented before the Board of Commissioners can act. The County Manager may decline to exercise the authority granted hereunder and may require that the change order be submitted under the regular procedure, or he/she may direct that the work be procured through the competitive process.

(b) The authority granted in this section may be exercised when immediate action must be taken to protect the County's interests, and only under the following circumstances (in addition to meeting the requirements of Section C):

(i) Threat to public health, welfare or safety; or

(ii) Threat of litigation when it appears likely that litigation will be commenced and that Fulton County's legal position may be compromised by delay in implementing the change order. Change orders citing this circumstance must be approved by the Office of the County Attorney; or

(iii) Loss of substantial resources due to delay, including delay to critical path schedule.

- (c) Department heads proceeding under this authority must comply with as much of the procedure set out in Section G (1) as the situation will permit.

- (d) At a minimum, the following procedures must be observed:
 - (i) The contractor shall execute a written contract Modification that clearly describes the work to be done and its cost. If costs cannot be fully detailed due to the exigencies of the situation, the Modification must set out a maximum cost and state that the cost will be definitized in a final change order.
 - (ii) The department head shall obtain the approval of the Purchasing Agent, prior to submitting the change order to the County Manager.
 - (iii) The work may proceed upon approval by the County Manager. The department head shall prepare all other documentation normally required for a change order, including completion of the Sign-Off Sheet.
 - (iv) Not later than sixty (60) days following approval of the change order, the County Manager shall place the change order on the consent agenda.
 - (v) In cases of change orders without definitized costs under Subsection (i) above, the department head shall commence processing a final change order as soon as circumstances permit.

**SECTION 9
EXHIBITS**

EXHIBIT 1

Request to Proposal (RFP) Submittal Check List for

The following submittals shall be completed and submitted with each proposal (see table below "Required Proposal Submittal Check List."). Please check to make sure that the required submittals are in the envelope before it is sealed. Failure to submit all required submittals may deem your proposal non-responsive.

Submit one (1) Original proposal and five (5) CD's as required in Section 3.1.2 of the RFP.

Item #	Required Proposal Submittal Check List	Check (√)
1	One (1) Proposal marked "Original", five (5) CD's	
2	*Form E: Georgia Security and Immigration Contractor Affidavit(s) and Agreements <i>Note: If prime contractor is a joint venture, partnership, LLC, each member of the entity must submit an affidavit</i>	
3	*Form F: Georgia Security and Immigration Subcontractor Affidavit (s)	
4	Technical Proposal	
5	Cost Proposal (submitted in a separate sealed envelope)	
6	Financial Information (submitted in a separate sealed envelope)	
7	Acknowledgement of each Addendum	
8	<i>PURCHASING Items below should match information requested in the Technical Proposal Format and Content of Section 3 of the RFP</i> Executive Summary Technical Approach/Detailed Work Plan Project Team Qualifications/Qualifications of Key Personnel Relevant Project Experience Proposer Financial Information Availability of Key Personnel Local Preference Disclosure Form and Questionnaire	
9	Purchasing Forms Form A: Certificate Regarding Debarment Form B: Non-Collusion Affidavit of Bidder/Offer or Form C: Certificate of Acceptance of Request Proposal requirements Form D: Disclosure Form & Questionnaire Form G: Professional License Form H: Local Preference Affidavit of Bidder/Offeror	
10	Office of Contract Compliance Requirements (separate envelope) Exhibit A: Promise of Non-Discrimination Exhibit B: Employment Record Exhibit C: Schedule of Intended Subcontractor Utilization Exhibit D: Letter of Intent to Perform as Subcontractor Exhibit E: Declaration Regarding Subcontractor Practices Exhibit F: Joint Venture Disclosure Affidavit Exhibit G: Prime Contractor/Subcontractor Utilization Report	

EXHIBIT 1**Request to Proposal (RFP) Submittal Check List for**

	Equal Business Opportunity Plan (EBO Plan) Exhibit H – First Source Jobs Program Information Form 1 Exhibit H – First Source Jobs Program Agreement Form 2	
	Evidence of Insurability, proposer must submit one (1) of the following: Letter from insurance carrier Certificate of Insurance An umbrella policy in excess of required limits for this project	
	Verify that Bidder/Proposer is registered w/Georgia Secretary of State and attach a copy of print out for each	
	Verify Georgia Utility License Number and attach a copy of print out for each Bidder/Proposer (If applicable)	
	Verify Professional License and attach a copy of the print out for each Bidder/Proposer (If applicable)	

Cost Proposal Summary

**SECTION 10
APPENDICES**