

County of Miami Request for Proposal

2024 - Document Management Solutions



Address MAILED proposals to:

Board of Miami County Commissioners
ATTN: 2024 - Document Management Solutions
Miami County Safety Building
201 W. Main St.
Troy, OH 45373

Timelines:

| | |
|--|------------------------------|
| Release of RFP: | February 20, 2024 |
| Deadline for Questions: | March 15, 2024 |
| Deadline for Letter of Intent to Respond: | March 15, 2024 |
| Final Response to Questions: | March 29, 2024 |
| Proposal Submission Deadline: | April 18, 2024 @ 1:35 PM EST |
| Recommendation to the Board of Commissioners: | June 4, 2024 |
| Effective Date / Contract Signed: | July 1, 2024 |

Contents

| | |
|---|----|
| General Overview and Evaluation Process Of RFP..... | 6 |
| Purpose | 6 |
| Minimum Qualifications | 6 |
| Schedule of Events | 6 |
| RFP Coordinator | 6 |
| RFP Amendments and Cancellation | 6 |
| Letter of Intent to Respond | 6 |
| Questions Pertaining to the RFP | 7 |
| Rights to Submitted Materials | 7 |
| Proposal Submittal | 7 |
| Public Records | 8 |
| Withdrawal of Proposal | 8 |
| Modification of Proposals | 8 |
| Proposal Opening | 9 |
| Rejection of Proposals | 9 |
| RFP Evaluation Factors | 9 |
| Evaluation of Proposals | 9 |
| Negotiation and Award of Contract | 10 |
| Contract Execution | 10 |
| Compliance with Ohio Law | 10 |
| Vendor Non-Discrimination | 10 |
| Scope of Work and System Requirements | 12 |
| Scope of Work | 12 |
| Storage | 12 |
| Scanning | 12 |
| Digital Storage | 13 |
| Document Management Software | 13 |
| Document Capture and Storage | 13 |
| Document Indexing Retrieval and Search | 13 |
| Document Viewer Functionality | 14 |
| Workflow Automation | 14 |
| Forms Management | 14 |

| | |
|--|----|
| Collaboration and Sharing..... | 14 |
| Security and Compliance..... | 14 |
| Integration and Scalability | 15 |
| Printing and Output | 15 |
| Reporting..... | 15 |
| Retention Management..... | 15 |
| Server / System Administration | 15 |
| Hosted Solution (if offered) | 16 |
| Data Backup and Recovery | 16 |
| Value Added Services..... | 16 |
| Third-Party Scanning..... | 17 |
| Damage Document Recovery..... | 17 |
| No Exclusions | 17 |
| Proposal Submission Requirements | 18 |
| General Instructions..... | 18 |
| Proposal Format..... | 18 |
| Cover Letter | 18 |
| Table of Contents..... | 19 |
| Executive Summary..... | 19 |
| Company Profile..... | 19 |
| Proposed Solutions | 19 |
| Implementation Approach..... | 20 |
| Ongoing Support and Hosting Services..... | 20 |
| Hardware/Software Requirements..... | 21 |
| References | 21 |
| Pricing..... | 21 |
| Proposed Legal Agreement..... | 22 |
| Additional Information..... | 22 |
| Buy Ohio Disclosure Statement | 22 |
| Delinquent Personal Property Tax Affidavit | 22 |
| Campaign Contributions Affidavit..... | 22 |
| Civil Rights Compliance Certificate | 22 |
| Non-Collusion Affidavit | 22 |

| | |
|---|----|
| Unresolved Findings for Recover | 23 |
| General Terms and Conditions | 24 |
| The Contract Documents | 24 |
| Prime Vendor Responsibilities | 24 |
| Related Contracts..... | 24 |
| Time of Performance | 24 |
| Pricing Terms..... | 24 |
| Record Keeping Requirements | 24 |
| Vendor Understanding..... | 25 |
| Conflicts of Interest..... | 25 |
| Public Records..... | 25 |
| Automatic Renewals | 25 |
| Heading | 25 |
| Governing Law – Severability..... | 26 |
| Compliance with the Law..... | 26 |
| No Additional Waiver Implied..... | 26 |
| Default by the Successful Vendor | 26 |
| Vendor Liability for Damages..... | 26 |
| Patent Indemnification | 27 |
| Assignment..... | 27 |
| Termination of Contract | 27 |
| Ownership..... | 27 |
| Travel Expenses..... | 27 |
| Method of Purchase / Billing | 28 |
| Standards of Performance and Acceptance | 28 |
| Equal Employment Opportunity | 29 |
| Attachment 1 | 30 |
| Mailed proposals sent to: | 30 |
| Timelines:..... | 30 |
| RFP Coordinator | 30 |
| Attachment 2 | 31 |
| Downtown Campus..... | 31 |
| 25A Campus | 31 |

Marybill Campus 31

One-Stop Campus 31

Attachment 3 32

Attachment 4 33

Attachment 5 34

Attachment 6 35

Attachment 7 36

Attachment 8 37

General Overview and Evaluation Process Of RFP

Purpose

The Board of Miami County Commissioners (“County”) on behalf of the Miami County Information Technology Department (“IT Department”) is issuing this Request for Proposals (“RFP”) to select a vendor with a proven record of accomplishment in the planning, providing, implementation and support of an electronic document management solution. The County is open to proposals for either a hosted or on-premise solution. The County desires a single vendor for all services requested in the RFP, however the County may consider alternates such as a prime vendor / subcontractor.

Minimum Qualifications

At a minimum, the vendor should provide the following:

- A document management solution that meets the requirements of the County;
- Unlimited Service and Support for the County while under contract;

Schedule of Events

The RFP schedule of events identifies the County’s best estimate of the schedule that will be followed. Please refer to the *Timelines* section of Attachment 1 for the primary schedule.

The County reserves the right to adjust this schedule as it deems necessary.

Demonstrations (demos) for products may be requested after proposals are submitted and before recommendation to the Board of the County Commissioners.

RFP Coordinator

All communications concerning this RFP must be submitted in an email format to the RFP Coordinator defined in Attachment 1. The RFP Coordinator will be the sole point of contact for this RFP unless a secondary point of contact is named by the County.

RFP Amendments and Cancellation

The County reserves the unilateral right to amend this RFP in writing at any time. The County also reserves the right to cancel or reissue all or any part of the RFP at its sole discretion. If an amendment is issued, it will be provided to all vendors that have submitted a Letter of Intent to Respond.

Letter of Intent to Respond

Vendors who anticipate submitting a proposal should submit an email indicating a vendor’s intent to respond to this RFP. The letter of intent should be emailed to the RFP Coordinator. The subject line of the email should read, “*{Company Name} – Letter of Intent to Respond – {RFP Title}*”. The following information should be included in the “Letter of Intent to Respond”:

- Name of Vendor
- Vendor’s Address
- Name of Vendors’ Primary Contact Person
- Contact Person’s Telephone Number and Email Address

Submittal of a “Letter of Intent to Respond”, by the specified deadline is highly desirable for submitting a proposal, and is necessary to ensure a vendor’s receipt of the RFP amendments and other

communication regarding the RFP. The “Letter of Intent to Respond” does not bind vendors to submitting a proposal. Not submitting a “Letter of Intent to Respond” does not preclude a vendor from submitting a proposal by the required deadline.

Questions Pertaining to the RFP

Questions or comments regarding this RFP must be put in writing to the RFP Coordinator and received by **2:00 PM EST** on the **Deadline for Questions** date found in the Timelines section of Attachment 1.

All questions will be answered in writing and posted as an addendum to the website no later than **4:00 PM EST** on **Final Response for Questions** date found in the Timelines section of Attachment 1. All vendors who have notified the County of their intent to respond to the RFP will be provided, via email, a copy of all questions submitted as well the County’s response.

No question, comment or request for information shall be considered answered by the County until the County has issued a written addendum in response and copies of such response has been issued to each Vendor. Upon submitting its Proposal, a Vendor shall provide the County with written notice that it has received a copy of the addendum on the form provided by the County.

Rights to Submitted Materials

All Proposals and related correspondence, reports, charges, schedules, exhibits, and other documentation submitted with this RFP will become property of the County.

Proposal Submittal

A Proposal must be submitted in a sealed envelope or package clearly labeled with the RFP title and addressed to the Board of Miami County Commissioners. Proposals shall arrive or be delivered to the County’s offices located at 201 West Main Street, 1st Floor, Troy, Ohio 45373 on or before the date and time listed as the “Proposal Submission Deadline” on Attachment 1 under the Timelines section. Each envelope must also set forth the Vendor’s name, address and phone number, and shall contain the original Proposal and five (5) copies. Any Proposal received after that time and date will be rejected and returned unopened. Interested parties are encouraged, but not required, to attend the Proposal opening. Facsimile or e-mailed Proposals will not be accepted by the County in response to this RFP.

Each submitted Proposal and any additional information submitted by a Vendor pursuant to this RFP shall become the property of the County. Pursuant to and subject to this RFP and the Ohio Revised Code, all information submitted shall become a record open to the inspection of the public. However, if there is material in a Proposal that a Vendor deems to be confidential, it should be clearly identified and marked confidential, and accompanied by a written explanation stating the basis of such claim. Any confidential material that is properly designated shall be removed from the Proposal prior to release of the Proposal to the public if permitted by the laws of the State of Ohio including, without limitation, Ohio Revised Code section 149.43. The determination as to the confidentiality of any material identified as confidential by a Vendor shall be made by the County in its sole and complete discretion. The County shall assume no risk, nor shall it be held liable by any Vendor for the release of any material which Vendor may claim to be confidential. Submittal by Vendor of a Proposal to the County shall be deemed acknowledgement of the terms and provisions contained in this RFP.

The submission of a Proposal shall be considered evidence that the Vendor has examined and is satisfied as to the terms, conditions, provisions, specifications and/or requirements for the Project described in this RFP.

No pleas of ignorance of any of the terms, conditions, provisions and/or specifications set forth in this RFP shall be accepted as a basis for any claim for an increase in the amount set forth in the final contract negotiated between the County and any Successful Vendor nor for an extension of any contract times set forth in the RFP and/or the final contract negotiated between the County and any Successful Vendor.

Unless otherwise specified in this RFP any rates set forth in a Proposal shall include all applicable federal, state and local taxes. The Successful Vendor shall pay all taxes lawfully imposed on it with respect to any product or service delivered in accordance with the RFP and/or any contract awarded as a result of the process set forth in this RFP. The County is exempt from state sales or use taxes. These taxes shall not be included in the Vendor's price except as may otherwise be applicable in the performance of the Project.

Any supplier or vendor with principals, or any other major stakeholders who are also employed by Miami County shall be deemed not eligible to submit bids on this project. Miami County reserves the right to disqualify any proposal that it determines does not comply with the policies of the County or creates a conflict, or the appearance of a conflict of interest for the County.

Public Records

Pursuant to Ohio Revised Code 149.43, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to the Ohio Public Records Act after the contract is awarded, and may be determined to be public records subject to disclosure, even if the vendor claims confidential treatment. The County will disclose public records as required under the Ohio Public Records Act.

After the bid is opened by the contracting authority, any information that is subject to an exemption set out in the Public Records Act may be redacted by the contracting authority before the record is made public.

Withdrawal of Proposal

Prior to the opening of Proposals, a Vendor may withdraw its Proposal provided the Vendor makes a written request to withdraw the Proposal and such request is received by Ms. Janelle Barga, County Clerk, at 201 West Main Street, 1st Floor, Troy, Ohio 45373 prior to the opening of Proposals. The written request to withdraw must be executed by a party authorized to execute the Proposal and either hand delivered or mailed to the County via regular U.S. mail. Any properly withdrawn Proposal will be returned to the Vendor unopened.

Modification of Proposals

At any time prior to the opening of Proposals, a Vendor may modify its Proposal in writing by submitting a modification marked in the same manner as the original proposal via hand-delivery or courier to the Offices of the Board of Miami County Commissioners, 1st Floor, 201 West Main Street, Troy, Ohio 45373 prior to the opening date and time of the Proposals.

Proposal Opening

All Proposals properly received by or before the date and time listed as the “Proposal Submission Deadline” on Attachment 1 under the Timelines section, shall be publicly opened. The names of the Vendors shall be publicly read though no price information will be released at the time of the opening. Interested Vendors or their representatives may be present for the opening of the Proposals.

Rejection of Proposals

The County reserves the right to reject any proposal in which the Vendor takes exception to the terms and conditions set forth in this RFP; fails to meet the terms and conditions of this RFP, including but not limited to, the standards, specifications, and requirements specified in this RFP; or submits prices that the County considers to be excessive, compared to existing market conditions, or determines exceed the available funds of the County. Furthermore, the County reserves the right to reject, in whole or in part, any proposal that it has determined, using the factors and criteria set forth herein, would not be in the best interest of Miami County.

Solicitation and opening of any Proposal submitted in response to this RFP does not create any express or implied obligation of the County to enter into any contract.

RFP Evaluation Factors

Proposals shall be evaluated based upon the Vendor’s ability to meet the factors set forth in Attachment 8 – Evaluation Factors as indicated in the Vendor’s submitted Proposal, and if appropriate, additional information request and interview responses.

Evaluation of Proposals

The County shall appoint an Evaluation Committee (“Committee”) to evaluate the Proposals received and make a recommendation to the County for the selection of the Vendor submitting the Proposal that is the most advantageous to the County based on the rankings performed by the Committee and the additional discussions described below. The Committee shall evaluate all Proposals received and rank the Vendors based upon the evaluation criteria set forth in Attachment 8. The County reserves the right to request additional information from Vendors as needed for the purpose of clarification or correction regarding a proposal to ensure full understanding of, and responsiveness to, the requirements specified in the RFP. If information is requested, the Committee is not required at this stage of the evaluation process to request the same information from all Vendors.

The Committee may, at its sole and complete discretion, select two or more of the highest qualified Vendors with which to hold additional discussions. Vendors not selected for further discussions may be excluded from further consideration for the contract to be awarded through this RFP upon notification by the Committee or the County. Additional discussions with selected Vendors may include, without limitation, discussions, interviews, and presentations by the selected Vendor or Vendors with the County to elaborate upon their qualifications, proposals, proposed scope of services, cost estimates, and other pertinent information. During the additional discussions phase" the Committee may permit revisions of Proposals. In such an event, all Vendors who have been selected for additional discussions shall be given an equal opportunity to revise their Proposals.

The County shall then rank the Proposals that have not been otherwise excluded from further consideration based upon the evaluation factors set forth in this RFP, the content of the Proposals

received, any revisions thereto, and any additional discussions with the Vendors that may have been held by the Committee and any non-excluded Vendors.

Negotiation and Award of Contract

After non-excluded Vendors have been ranked pursuant to the previous section, the County shall enter into contract negotiations with the highest ranked Vendor (thus, the Vendor which has submitted the Proposal deemed most advantageous to the County). Negotiations shall cover such terms, provisions, conditions, scope of services and other matters as the parties deem appropriate to attain the objectives of the Project contemplated in this RFP. If negotiations between such highest ranked Vendor and the County fail to result in a contract between the County and such Vendor, those negotiations shall be terminated and the County may enter into contract negotiations with the next highest ranked Vendor. At the County's sole and complete discretion, the County may terminate contract negotiations with a Vendor and begin contract negotiations with the next highest ranked Vendor. Such process may continue until a contract has been successfully negotiated between the County and a Vendor or until there are no Vendors left in which to hold contract negotiations.

At any time prior to the execution of a contract by the County, the County may cancel or terminate the process set forth in this RFP. No contract negotiated between the County and a Successful Vendor shall become effective until the terms, conditions, provisions, and services negotiated between the County and a successful Vendor have been reduced to a written contract and the resulting contract has been executed by the Successful Vendor and the County.

Contract Execution

Any contract awarded shall be signed by the Successful Vendor and returned within 30 days after receipt of a "Notice of Award" and a negotiated contract for signature. No contract resulting from negotiations with a Successful Vendor or from the process set forth in this RFP shall be considered binding upon the County until execution of the contract by the Successful Vendor and the County.

If a Successful Vendor fails to execute and return the contract and other required documents within 30 days of the receipt of the notice of award, the County may in its sole and complete discretion withdraw the award of the contract to a Successful Vendor and begin negotiations with the next highest ranked Vendor pursuant to the terms, conditions, and provisions set forth in this RFP or in the alternative, the County may terminate the process set forth in this RFP.

Compliance with Ohio Law

The implementation of this RFP and its interpretation and construction; the award and execution of any contract hereunder, and the implementation, interpretation and construction of any such contract shall be governed by the laws of the State of Ohio, without regard to its own "choice of law" provisions, and furthermore, shall govern any claim, suit or action between the County and any vendor, contractor or other party, whether any such claim, suit or action is based upon tort or otherwise. Any action or proceeding pertaining to this RFP or any Contract awarded as a result of this RFP shall be heard in a court of appropriate jurisdiction and venue located in Miami County, Ohio.

Vendor Non-Discrimination

Each Vendor acknowledges and agrees that in submitting any proposal hereunder, and in performing any contract awarded to it under this RFP, that neither it nor any sub-contractor will discriminate against

any employee or qualified applicant for employment who is both available and qualified for work because of age, race, color, religion, sex, disability, creed, national origin or military veteran status. Neither the Contractor nor any sub-contractor shall discriminate based upon age, race, color, religion, sex, disability, creed, national origin, or military veteran status, in any undertaking related to employment including (but not limited to) such actions as hiring, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, pay rates, compensation, and/or selection for training, including apprenticeship.

Scope of Work and System Requirements

Scope of Work

The County respectfully requests proposals from qualified vendors for implementation and deployment of a document management solution to be utilized by all County Elected Officials and their respective Offices. The proposed solution can either be an on-premise solution running on County-owned hardware, or a cloud-based solution.

The goal is to implement a system that stores digital images quickly and effectively for later retrieval by securely defined user groups. The system should support archival permanency with the ability to remove records by date, type, or number range. The system must be able to export the digital information into various formats, and to allow quick, easy, and timely retrieval of records and information as needed. The system should have the ability to control the authoring, check in/out, and/or version control of documents being developed, managed, or stored. It should also give users the ability to index or enter the “metadata” associated to the documents being entered into the system.

This project shall consist of a solution to archive existing files, perform optical character recognition (OCR), and must maintain the ability to preserve the file for archival and retention purposes.

Storage

The document storage solution should accommodate the County’s current document inventory, as well as all future documents. The system should be scalable to accommodate future growth and allow for easy storage and retrieval of documents.

- Adequate storage capacity to accommodate the member institution's current and future document needs
- Security measures to protect documents from loss, damage, or unauthorized access
- Efficient retrieval and tracking of stored documents
- Compliance with relevant industry standards and regulations for document storage

Scanning

The document scanning service should encompass the conversion of physical documents into digital format, creating searchable and editable electronic copies. The solution should ensure high-quality and accurate scanning, facilitating efficient document retrieval

- Utilization of high-quality scanners (600 dpi or more) capable of handling various document sizes, formats, and types
- Support for a wide range of scanners is required
- Use of OCR technology to convert scanned documents into searchable and editable electronic copies
- Compatibility with common file formats for seamless document sharing
- Offer document indexing services, capturing relevant metadata for easy search and retrieval
- Support for bulk scanning to efficiently process large volumes of documents
- Quality control measures to ensure accuracy and completeness of scanned documents
- Adherence to privacy and data security standards to protect the confidentiality of scanned documents

- Integration with Microsoft Office for immediate saving to DME solution is a plus

Digital Storage

The digital storage solution should encompass the provision of storage solutions for electronic documents and data. This may include options such as dedicated servers or cloud-based storage, based on the County's preferences and requirements. The solution should ensure secure, scalable, and accessible storage, enabling efficient document management and retrieval.

- Provision of secure and reliable storage options, such as dedicated servers or cloud-based storage, based on the member institution's preference
- Scalable storage capacity to accommodate County's growing digital document and data needs
- Implementation of robust security measures to protect the confidentiality and integrity of the original electronic documents and data.
- Compatibility with common file formats (e.g., PDF, Word, Excel, TIFF, etc.) to facilitate seamless sharing and collaboration
- Integration capabilities with other document management systems or enterprise applications, if applicable
- Efficient indexing and metadata management to enable easy search and retrieval of stored electronic documents by title, ID, classification, etc., or any user defined index value, including wildcard
- Compliance with relevant data privacy and regulatory standards, ensuring legal and ethical handling of electronic documents and data
- Availability of disaster recovery procedures and mechanisms to mitigate the risk of data loss
- Training materials and documentation on proper usage and administration of the storage solution
- Ongoing support and maintenance services to ensure optimal performance and availability of the storage infrastructure

Document Management Software

Document Capture and Storage

- Ability to scan and import physical documents into the system
- Ability to import existing electronic documents into the system
- Ability to import emails (emails and attachments) into the system
- Support for various file formats (e.g., PDF, Word, Excel, TIFF)
- Efficient organization and categorization of documents
- Version control and revision history tracking
- Secure storage and backup options
- Deletion of files/folders should require administrator access or re-authentication

Document Indexing Retrieval and Search

- Ability to allow indexing documents in various ways (i.e. ID number, alphabetically, year & term, arbitrary metadata entered by user, etc.)
- Advanced search capabilities for quick and accurate document retrieval

- Metadata tagging and indexing for efficient categorization
- Full-text search functionality within document contents
- Search using a wildcard
- Filtering and sorting options to refine search results
- Retrieval of only documents for which the user has access to

Document Viewer Functionality

- Be able to open documents in native format
- Ability to merge documents and extract pages
- Redaction with option to password protect. Redactions should be able to be done on entire pages or portions of the document.
- Ability to rotate documents in view and save the rotated view
- Perform common operations such as re-index, copy, email, export, and print
- Provide a comprehensive set of annotation tools including stamps, sticky notes, & highlighter
- Allow items to be flagged as publicly accessible and be readily searchable by public citizens. Flagging items as publicly accessible should be available at the folder and file level.
- Publicly available documents should include any redactions.
- Items should have the ability to be flagged as “private” for viewing of authorized personnel only.

Workflow Automation

- Ability to create multiple workflows based on departments, users, or document types.
- Ability to easily move documents between users and departments
- Email notifications when user receives a document to view
- Ability to approve / deny documents
- Electronic signature capabilities
- Workflow creates an audit trail
- Automatic event notification via email
- Workflow can automatically start when a document is added

Forms Management

- Customizable form creation
- Automated form routing and approval workflow
- Library of prebuilt form templates for common business processes, such as employee onboarding, expense reimbursement, or customer feedback.
- Ensure form data security and access controls

Collaboration and Sharing

- Secure sharing and collaboration features for internal and external stakeholders
- Controlled access permissions to ensure data confidentiality
- Document annotation, commenting, and version comparison capabilities
- Real-time collaboration and simultaneous editing options

Security and Compliance

- Role-based access control to restrict document access based on user roles and permissions
- Encryption of data in transit and at rest to ensure data security

- Audit trail and activity logging for compliance purposes
- Compliance with data protection regulations and industry standards
- Encrypted communication between server and clients
- Option for Secure Socket Layer (SSL) encryption
- Comprehensive designation of system privileges by user and group
- Ability to assign permission by document type
- Single-Sign-On using the SAML protocol supporting integration with Microsoft Entra or Active Directory Federation Services

Integration and Scalability

- Seamless integration with existing systems and applications (e.g., CRM, ERP)
- Right for the County to use the same APIs available to third-parties for development of internal-use applications including documentation and API access privileges as third-party developers
- Scalability to accommodate growing document volumes and user base

Printing and Output

- Highly desirable to have scanned documents be able to export to TIFF for microfilm/fiche
- Print to any print device within a platform's standard desktop / network printing environment
- Ability to print documents with or without all annotations or only visible annotations
- Control printing permissions through application security
- Ability to attach documents to outgoing email

Reporting

- Ability to create custom reports using a graphical user interface that does not require textual programming
- Reports can be run from document management solution
- Unlimited output lines on reports
- Ability to add retrieval arguments to reports
- Ability to export reports to multiple file formats (i.e. Word, Excel, PDF, etc.)

Retention Management

- Ability to define multiple retention parameters based on type of document
- Ability to remove documents automatically based on retention parameters
- Ability to have documents sent for review before being automatically deleted.
- Create a document audit log
- Ability to recover deleted documents

Server / System Administration

- Ability to disable user accounts without deleting them
- Monitor license availability and usage from administrative interface
- View real-time list of logged-on clients, with information about server instance, server host, IP address, and time connected
- Web browser and desktop client interface
- Server logs viewable thru DMS for ease of troubleshooting
- Ability to export/import administration settings.

- On-premises hosted software must support Windows 2019 or newer
- Desktop interface client needs to be Windows 10 or higher
- Full audit trail of documentation creation, modification, deletion, and access.
- Deletion of files/folders should require administrator access and re-authentication

Hosted Solution (if offered)

- Ability to disable user accounts without deleting them
- Monitor license availability and usage from administrative interface
- View real-time list of logged-on clients, with information about server instance, server host, IP address, and time connected
- Web browser and desktop client interface
- Server logs viewable thru DMS for ease of troubleshooting
- Ability to export/import administration settings.
- On-premises hosted software must support Windows 2019 or newer
- Desktop interface client needs to be Windows 10 or higher
- Full audit trail of documentation creation, modification, deletion, and access.
- Deletion of files/folders should require administrator access and re-authentication
- Files entered into the solution remain the property of the respective Miami County Agencies.
- Fully defined process for terminating contract, including recovering of files, folders, indexes, etc.

Data Backup and Recovery

The data backup and recovery should encompass creating backups of electronic data and establishing reliable procedures for data recovery, protection against data loss due to system failures, disasters, or emergencies and ensure the timely restoration of data to minimize disruptions.

- Regular backups of electronic data to prevent data loss and enable restoration
- Clear procedures for performing backups, especially frequency and timing
- Implementation of backup retention periods that align with the member institution's data protection and compliance policies
- Clearly defined recovery time objectives (RTOs) and recovery point objectives (RPOs), to establish the desired speed and level of data recovery
- Disaster recovery planning and implementation to ensure the member institution's ability to recover data and resume operations in case of major disruptions
- Documentation of backup and recovery procedures, including step-by-step instructions and contact information for support or escalation

Value Added Services

We welcome any additional value-added services you may provide, including but not limited to third-party scanning and damage document recovery.

Third-Party Scanning

- Option to have a third-party gather, scan, and return original documents on a case-by-case basis.
- Must be able to provide steps on the process, any certifications, verification processes, etc.

Damage Document Recovery

- Develop clear and well-documented procedures for physical document recovery, including step-by-step instructions for various scenarios, such as partial or complete document loss
- Define Recovery Time Objectives (RTOs) and Recovery Point Objectives (RPOs) to establish the desired speed and level of document recovery
- Maintain a record of previous document recovery incidents, lessons learned, and improvements made to enhance future recovery efforts

No Exclusions

No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent's catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

Proposal Submission Requirements

General Instructions

Proposals should provide a straightforward, concise description of the vendor's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

Proposals should be organized consistent with the outline provided in this section of the RFP. Vendors must follow all formats and address all portions of the RFP set forth herein providing all information requested.

Submittals must be received no later than the "Submissions Deadline" date found in Attachment 1. Proposals received after this date and time will not be considered.

Please provide five (5) hard copies of all submittals.

Proposal Format

Proposals must be structured, presented, and labeled in the following manner:

- Cover Letter
- Table of Contents
- Executive Summary
- Company Profile
- Proposed Solution, including all scenarios if applicable
- Implementation Approach and Training
- Ongoing Support and Hosting Services
- Hardware/Software Requirements
- References
- Pricing
- Proposed Legal Agreement(s)
- Additional Information
- Attachments
 - Delinquent Personal Property Tax Affidavit
 - Buy Ohio Disclosure Statement
 - Non-Collusion Affidavit
 - Campaign Contributions Affidavit
 - Civil Rights Compliance Certificate

Failure to follow the specified format, to label the responses correctly, or to address all the subsections may result in the rejection of the Proposal.

Cover Letter

- The Cover letter will reference and respond to each of the following bulleted items.
- Signature of a company officer empowered to bind the vendor to the provisions of this RFP and any contract awarded pursuant to it.
- A high-level statement of the vendor's credentials to deliver the services sought under the RFP.
- A statement indicating the proposal remains valid for at least ninety (90) days.

- A statement that the vendor or any individual who will perform work for the vendor is free of any conflict of interest.

Table of Contents

All pages are to be numbered and the table of contents should identify each major section.

Executive Summary

This section of the proposal should provide a concise synopsis of vendor's proposal and credentials to deliver the services sought under the RFP. In addition, it should explain how the proposed solution will differentiate itself from other vendor solutions and the reasons the County should select the proposed solution. This may include a list of the unique features that give the vendor a competitive edge in the market.

Company Profile

This section of the proposal must include the following company information:

- Provide the legal entity name, Federal Employer Identification Number (EIN), and form of business (i.e. Corporation, LLC, etc.);
- Identify if the vendor is a subsidiary of a larger company. If so, whom;
- Provide a primary contact name, address, phone number, and email address;
- Identify the location of company headquarters and offices, which will support the implementation;
- Identify the location, hours of operation, and contact information of ongoing maintenance and support staff;
- A brief description of the Vendor's background, nature of business and organizational history;
- Provide the current number of employees at the company;
- Provide the current number of employees dedicated to the solution you are proposing;
- Identify all subcontractors and associated scope of work;
- Identify any pending litigation against the vendor;
- Identify if vendor has filed any bankruptcy or insolvency processing in the last 10 years;
- Identify any mergers, acquisitions, or sales of the vendor company within the last five years (if so, an explanation providing relevant details);
- A statement of how long the Vendor has been providing the solution you are proposing, as required by this RFP;
- Disclose the Vendor's annual company revenues and profit for the last 3 company fiscal years. It is acceptable to include this information as an appendix in the proposal;
- Identify examples of your existing client base including the number of clients you provided the services being proposed here;

Proposed Solutions

In this section the vendor should identify the proposed solution up to and including the following:

- Provide a feasibility statement and/or a proposed solution.
- Provide a comprehensive description of the solution proposed.

- Vendors are to provide an adequate description of how the solution meets the requirements to allow the evaluators to fully understand the features, processes, functions, and capabilities.
- Based on the vendor's experience and expertise, identify any additional proposed features, functions, or capabilities that the County should consider to meet the County's stated purpose.

Implementation Approach

In this section the vendor should address the following:

- Provide a project organization chart highlighting the key staff who will be assigned to accomplish the work and related bios for the project manager and key personnel
- Describe your implementation methodology and approach. This includes the tools and techniques that will be used and methodologies that will be employed.
- Describe the roles and responsibilities of both the County and vendor staff during each phase of implementation. In addition, provide an estimated level of effort and skillset required for the County staff during implementation.
- Provide a project schedule that includes all tasks, deliverables, milestones, and resources required. The County seeks a detailed understanding of the work plan that will be followed to ensure success. The County would like the hardware and/or software to be operational within ninety (90) days of the contract award.
- Describe your user acceptance testing methodology and criteria for success. Also, outline the responsibilities of County staff during user acceptance testing.
- Describe your training strategy/plan that includes current and future employees of County in the use of the solution, as well as other functions/features County staff will need to use to administer the site.

Ongoing Support and Hosting Services

In this section the vendor should address the following:

- Describe ongoing support processes, procedures, and methods. At a minimum, the description should identify hours of support, methods to access support, after-hours support; including any support available to individual users, response time commitments, and escalation procedures.
- If you are proposing a cloud-based solution:
 - Describe proposed service level metrics and/or commitments and your uptime over the last 24 months;
 - Describe the proposed hosting services and associated ongoing service level commitments;
 - What tier is the hosting facility where the solution will be hosted;
 - Any Data Center compliance certifications;
 - Are there storage limitations to the amount of data housed;
 - Are there restrictions to how long data can be stored;
 - Describe security and backup and disaster recovery processes and procedures;
 - Describe software release/update frequency and procedures to perform updates.
- If you are proposing an on-premise solution:
 - Describe software release/update frequency and procedures to perform updates;

- Discuss the vendor's philosophy and approach for ongoing research and development (R&D) to advance the proposed solution and ensure it remains current to evolving technologies and standards. Please include the annual R&D investment for the solution being proposed, both in terms of financial investment and total number of employees dedicated to the R&D function.

Hardware/Software Requirements

In this section the vendor should address the following:

- If proposing an on-premises solution,
 - Provide system requirements for hardware as well as all necessary software for the server; include OS, database server, and web server.
 - Please describe any additional costs and processes for running a development environment and/or a disaster recovery server.
- Please disclose any software that is required to be installed on a user's machine.
 - Please include desktop software and plug-ins. For each, please include the following:
 - System Requirements;
 - Describe how the software can be installed and kept updated centrally;
 - Describe any special permissions required by the user to run the software (e.g.: Local Administrator);
 - Which type of user requires the software; for example: all users, departmental admins, or super admins.
- Additional Client Software

References

- What percentage of your customers are still running your solution with active maintenance and support contracts (i.e., lifetime customer retention)?
- The vendor must provide at least five references. At least three of the references should be for a solution that has been implemented in the last three years. The County prefers references from government agencies with similar demographics.
 - For each reference, vendor should provide the following information:
 - Entity name;
 - Customer contact information (name, title, phone, and email);
 - Scope of work performed identifying the services provided and solutions implemented;
 - Project start and end dates

Pricing

The County is seeking a clear and comprehensive understanding of all costs associated with the planning, design, development, implementation, training, hosting (if proposing a hosted solution), and ongoing maintenance of the proposed solution. In this section, the vendor must itemize all costs. For ongoing costs vendor is to include options for three (3) years with two (2) single year extensions not to exceed a total of five (5) years.

Vendor pricing should be provided for the following:

- Software licensing;
- Hardware;
- Any third-party solutions;
- Integration/Interfaces – provide level of effort and hourly rate;
- Implementation services – provide level of effort and hourly rate by implementation phase;
- Training;
- Ongoing support and maintenance;
- Optional products or services;
- Travel.

Proposed Legal Agreement

It is recognized that the formal basis of any agreement between the County and the vendor is a contract rather than a proposal. In this section, the vendors must include a draft of the proposed legal agreement(s) for the project, including:

- Any proposed software licensing, hosting, and maintenance and support agreements.

The proposed legal agreement(s) may serve as the basis for contract negotiations between the County and the selected vendor(s) or the County may elect to use its own agreement as the basis. Vendors' legal agreements should consider Ohio law and include contract language that is suitable for contracts with Ohio public entities.

Additional Information

In this section, the vendors are required to provide the following materials:

- Example of the user and administrative manuals
- Example of a training manual
- Any Informational material regarding the suggested product

Buy Ohio Disclosure Statement

The Vendor shall complete and submit a Buy Ohio disclosure statement (*Attachment 3*).

Delinquent Personal Property Tax Affidavit

The Vendor shall complete and submit an affidavit concerning delinquent personal property taxes (*Attachment 4*).

Campaign Contributions Affidavit

The Vendor shall complete and submit an affidavit concerning campaign contributions (*Attachment 5*).

Civil Rights Compliance Certificate

The Vendor shall complete and submit the civil rights compliancy certificate (*Attachment 6*).

Non-Collusion Affidavit

The Vendor shall complete and submit an affidavit concerning non-collusion (*Attachment 7*).

Unresolved Findings for Recover

The County shall not award a contract to a Vendor against whom a finding for recovery has been issued by the Auditor of State if the finding is unresolved.

General Terms and Conditions

The Contract Documents

The contract documents shall consist of the following in order of controlling priorities for priority in conflict between documents.

1. Any addenda issued by the County;
2. The RFP;
3. The successful Vendor's proposal;
4. The executed agreement for hardware, software, training, and maintenance services between the selected Vendor and Miami County, Ohio;
5. The purchase order issued under the contract.

Prime Vendor Responsibilities

The selected Vendor shall assume responsibility for all services and the program offered in the RFP. Further, the County will consider the selected Vendor to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

Related Contracts

After award of the contract to the lowest and best vendor, the successful Vendor shall not hire or use subcontractors not previously identified in its RFP without prior written approval from the County. Any such sub-contract must include "work made for hire" language for the benefit of ownership by Miami County, Ohio. No approval is required for the purchase of equipment, articles, supplies, components, or mechanical services, provided those pieces of equipment, articles, supplies, components, or mechanical services do not include installation, programming, hardware, or other goods and services of the kind contemplated by the contract. All work subcontracted shall be at the expense of the Vendor.

Time of Performance

The contract shall be binding upon both parties upon receipt by the successful Vendor of a fully executed copy of the contract and receipt of a purchase order issued by the County.

Pricing Terms

All prices set forth in any Vendor's RFP shall remain firm for a period of ninety (90) calendar days after the scheduled due date

All pricing submitted by the successful Vendor shall remain firm during the life of the contract, including any optional one-year terms.

Record Keeping Requirements

The successful Vendor shall maintain all financial records in a manner consistent with generally accepted accounting principles. Documentation to support each action shall be filed in a manner allowing it to be readily located.

During the period covered by this contract and until the expiration of three (3) years after final payment under the contract, the successful Vendor agrees to provide the County, its duly authorized representative, and any person, agency, or instrumentality providing the County with financial support

to the work undertaken hereunder with access to and the right to examine any books, documents, papers, and records of the Vendor involving transactions related to the contract.

Vendor Understanding

BY SUBMITTING A RFP, THE VENDOR ACKNOWLEDGES THAT IT HAS READ THIS REQUEST FOR PROPOSALS, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS REQUIREMENTS, TERMS AND CONDITIONS. THE COUNTY RESERVES THE RIGHT TO DISQUALIFY ANY PROPOSALS THAT TAKE EXCEPTION TO OR LIMIT THE RIGHTS OF THE COUNTY UNDER THE REQUIREMENTS, TERMS, AND CONDITIONS OF THIS RFP. FURTHERMORE, BY PROVIDING THE COUNTY WITH A BID BASED ON THIS RFP, THE VENDOR EXPRESSLY WARRANTS THAT IT'S PROPOSED SYSTEM WILL FULFILL THE REQUIREMENTS OF THIS RFP.

Conflicts of Interest

No personnel of the Vendor or member of the governing body of any locality, or other public official or employee of any such locality in which, or relating to which, the work under this contract is being carried out, and who exercises any functions or responsibilities in connection with the review or approval of the undertaking or carrying out of any such work, shall prior to the completion of said work, voluntarily acquire any personal interests, direct or indirect, which is incompatible, or in conflict with the discharge and fulfillment of such person's functions and responsibilities with respect to the carrying out of said work.

Any person who acquires an incompatible or conflicting personal interest prior to, on, or after the effective date of this contract, or who involuntarily acquires such an incompatible conflicting interest shall immediately disclose that interest to the County in writing. Thereafter, such person shall not participate in any action affecting the work under this contract, unless the County determines that, in light of the personal interest disclosed such person's participation in any such action would not be contrary to the public interest.

Public Records

Pursuant to Ohio Revised Code 149.43, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to the Ohio Public Records Act *after* the contract is awarded, and may be determined to be public records subject to disclosure, even if the vendor claims confidential treatment. The County will disclose public records as required under the Ohio Public Records Act.

After a proposal is opened by the County, any information that is subject to an exemption set out in the Public Records Act may be redacted by the contracting authority before the record is made public.

Automatic Renewals

Any contract provided shall not have automatic renewal clauses outside of the proposed term length defined in the original proposal.

Heading

The headings used in the RFP are for convenience only and shall not affect the interpretation of any of the terms and conditions.

Governing Law – Severability

SEE PROPOSED CONTRACT.

Compliance with the Law

The successful Vendor shall comply with all applicable federal, State of Ohio, and local laws in the conduct of the work set forth in the contract documents. The successful Vendor accepts full responsibility for payment of all taxes and insurance, including workers' compensation insurance premiums, unemployment compensation insurance premiums, all income tax deductions, and social security deductions for all work authorized by this contract.

No Additional Waiver Implied

If the County or the successful Vendor fails to perform an obligation or obligations set forth in the contract documents and such failure is subsequently waived by the other party, the waiver shall be limited to the particular failure so waived. Waiver by the County shall not be effective unless it is in writing.

Default by the Successful Vendor

The County declares and the successful Vendor acknowledges that the County may suffer damages resulting from the failure of the successful Vendor to act in accordance with the requirements, terms and conditions set forth in the contract documents. The successful Vendor agrees that the County will never be deemed to have waived any of its rights or remedies concerning any failure of performance by the successful Vendor unless the County executes a written waiver of such rights or remedies.

Unless expressly stated in the contract documents, the successful Vendor agrees that it shall correct any failure of performance within two (2) working days of written, oral or actual notice thereof by the County or its designee(s). If the successful Vendor does not correct the failure or failures within the two (2) working days, the failure or its lack of correction shall constitute default on the part of the successful Vendor.

If, by reason of force majeure, the successful Vendor is unable in whole or in part to perform under the contract, the successful Vendor shall not be deemed in default during the continuance of such inability. As used in this document, the term "force majeure" means, by way of example and not of limitation: acts of God; acts of public enemies; insurrection; riots; epidemics, lightning; earthquakes; fire; storms, floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; and explosions. After the force majeure has ceased, the successful Vendor shall remedy with reasonable dispatch its obligation(s) contained herein.

In the event the successful Vendor is unable to act in accordance with the contract for a period of ten (10) working days by reason of force majeure, the County shall have the right at its option to terminate the contract. Any such termination shall be in writing.

Vendor Liability for Damages

No delay or omission to exercise any right or option accruing to the County upon any default by the successful Vendor shall impair any such right or option or shall be construed to be a waiver thereof, but any such right or option may be exercised from time to time and as often as may be deemed expedient by the County.

Patent Indemnification

At its own expense, the successful Vendor shall defend any suit brought against the County, including, but not limited to, its public officials and county employees, based on a claim that the program or any part of the program furnished under this contract infringes a United States Patent or Copyright or constitutes misuse or misappropriation of a trade secret, provided the successful Vendor is given prompt notice in writing of the suit, the cost of any suit, or damages for which the County is liable that are attributable to the claim, shall be borne by the successful Vendor.

If the program or any part of the program furnished is likely to or does become subject to a claim of infringement of a United States Patent or Copyright or constitutes misuse or misappropriation of a trade secret, at its own expense, the successful Vendor shall do one of the following:

1. Obtain the right for continued use of the system or part of the system by the County;
2. Modify or furnish a substitute for the alleged infringing system or part of the system for the County;
3. Take back the system or part of the system subject to the County's concurrence, and issue a refund to the County for the remaining value of the term of the contract.

The successful Vendor shall not exercise the third option until the County has evaluated the first two options. Any program or part of the program substituted under the second option shall be equivalent to or exceed in quality or performance of the original accepted program or part of the program. All options are subject to approval by the County, provided that no prior approval or concurrence by the County shall be required for removal of the system or part of the system if its use has been enjoined by a Court of competent jurisdiction in Ohio. If the use of the system or part of the system has been enjoined by a court of competent jurisdiction in Ohio, the successful Vendor shall issue a refund to the County as provided in option three above.

Assignment

Neither the contract, nor any rights, duties, nor obligations described in the contract, shall be assigned by either party without the prior written consent of the other party.

Termination of Contract

SEE PROPOSED CONTRACT

Ownership

Documents and materials prepared for, or in connection with, the contract documents by the successful Vendor's personnel shall become the property of the County. Work papers pertaining to the tasks and reports shall be made available, upon request, to the County project manager or his or her representative for review, inspection, and, if desired, reproduction. Work papers shall be retained by the successful Vendor for at least three (3) years subsequent to the final payment required under the contract. Under no circumstances can the successful Vendor prohibit or take any action to withhold any data related to the County program from the County or the public. **The County owns all data and at no time in a dispute can the successful Vendor use data as a dispute item.**

Travel Expenses

All travel expenses will be borne by the Vendor.

Method of Purchase / Billing

A purchase order shall be issued to purchase from the contract.

All line items that appear on any invoice issued pursuant to the contract must have receipts or other appropriate documentation to support the expenditure and must be available upon request.

The successful Vendor shall submit an invoice to the "Bill To" address on the purchase order. A proper invoice must include the following information and/or attached documentation:

1. Name, address and federal tax identification number of Vendor as designated in the contract
2. Invoice remittance address as designated in the contract.
3. For hardware and software, the description of the deliverable, serial number when applicable, unit price, quantity and total price of the deliverable actually delivered or rendered as specified in the contract.

Payments under the contract shall be due on the forty-fifth (45th) calendar day after the later of the date of actual receipt of a proper invoice in the office designated to receive the invoice or the date the system, materials, goods, supplies, or services are accepted in accordance with the terms of the contract. The date of the check issued in payment shall be considered the date payment is made. Vendor payment shall not be initiated before an invoice is received.

Standards of Performance and Acceptance

System acceptance is dependent upon a sixty (60) day successful standard of performance as defined herein.

This section also applies to the system or part thereof submitted for product evaluation as well as replacement or substitutes for the system and the system which is field modified after the installation site has completed a successful performance period.

1. The performance period shall begin on the date of complete and successful program implementation and shall end when the program has met the standard of performance identified in this RFP for a period of sixty (60) consecutive days by operating in conformance with the County's specifications as set forth in this RFP. The County, through its Director of Information Technology Department, will determine if, and when, a successful performance period has been achieved based upon the Vendor's responsiveness to support issues.
2. In the event that program does not meet the standard of performance during the initial sixty (60) days, the standard of performance test shall continue on a day-by-day basis until the standard of performance is met for a total of sixty (60) consecutive days.
3. If the system fails to meet the standard of performance after ninety (90) calendar days from the start of the performance period, the Vendor shall be in default. The Vendor shall have ten (10) working days to remedy such default. Such default shall only be remedied when the County agrees that a successful performance period has been completed. In addition to all the other rights and remedies conferred to the County under the contract, the County reserves the right to request replacement of the system or terminate the order.
4. Downtime is a period of time when the solution is inoperable due to failure.

5. Downtime shall start from the time the County notifies the successful Vendor's designated representative of the issue until the software is returned in proper operating condition (rounded to the nearest quarter hour).
6. The system shall not be accepted nor the balance of charges paid until the performance period is complete.
7. Uptime and downtime shall be measured in hours and quarter hours, rounded up to the next closest hour or quarter hour.
8. Should it be necessary, the County may delay the start of the performance period, but such delay shall not exceed thirty (30) consecutive days after the installation date. Unless otherwise mutually agreed to by the County and the successful Vendor, the performance period must start not later than the thirty-first (31st) day after the installation date.

Equal Employment Opportunity

In carrying out the contract, the Vendor shall not discriminate against any employee or applicant for employment because of race, religion, national origin, color, sex, sexual orientation, age, handicap, or military veteran status. The Vendor shall ensure that applicants are hired, and that employees are treated during employment, without regard to their race, religion, national origin, color, sex, sexual orientation, age, handicap, or military veteran status. Such action shall include but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation' and selection for training including apprenticeship.

The Vendor agrees to post in conspicuous places available to employees and applicants for employment, notices setting forth that the Vendor complies with all applicable federal and state nondiscrimination laws. In all solicitations or advertisements for employees placed by or on behalf of the Vendor, the Vendor shall state that all qualified applicants will receive consideration for employment without regard to race, religion, national origin, sex, sexual orientation, age, handicap, or military veteran status. The Vendor shall incorporate the foregoing requirements of this paragraph in all of its contracts for any of the work prescribed in this contract (other than subcontracts for standard commercial supplies or raw materials), and will require all of its subcontractors for any part of such work to incorporate such requirements in all subcontracts for such work.

Attachment 1

The following information should be used

Mailed proposals sent to:

Board of Miami County Commissioners
ATTN: 2024 – Document Management Solutions
Miami County Safety Building
201 W. Main St.
Troy, OH 45373

Timelines:

| | |
|--|--------------------------------------|
| Legal Advertisement | February 20,2024 & February 27, 2024 |
| Release of RFP: | February 20, 2024 |
| Deadline for Questions: | March 15, 2024 |
| Deadline for Letter of Intent to Respond: | March 15, 2024 |
| Final Response to Questions: | March 29, 2024 |
| Proposal Submission Deadline: | April 18, 2024 @ 1:35 PM EST |
| Recommendation to the Board of Commissioners: | June 4, 2024 |
| Effective Date / Contract Signed: | July 1, 2024 |

RFP Coordinator

Written questions are to be emailed to:

2024 – Document Management RFP
c/o Adam Emswiler
Director of IT
2024_DocumentManagement_RFP@MiamiCountyOhio.gov

The email subject must include the RFP title.

County Locations

Downtown Campus

- Safety Building
201 W. Main St.
- Courthouse
215 W. Main St.
- Hobart Center
510 W. Water St.
- Power Plant
209 W. Water St.

25A Campus

- Animal Shelter
1110 N. County Rd 25A
- Transit
2036 N. County Rd 25A
- Incarceration Facility
2042 N. County Rd 25A
- Job and Family Services
2040 N. County Rd 25A
- West Central
2044 N. County Rd 25A
- Sheriff Training Center
2050 N. County Rd 25A

Marybill Campus

- Communication Center
210 Marybill Dr.
- Auto Title (present)
1275 Experiment Farm Rd.

One-Stop Campus

- Department of Development (future)
1506 One-Stop Court
Suite 600
- Auto Title (future)
1506 One-Stop Court
Suite 500

BUY OHIO DISCLOSURE STATEMENT

PLEASE COMPLETE THE FOLLOWING FORM AND SUBMIT IT WITH EACH COPY OF YOUR BID.

1. Do you have facilities within Ohio? _____ Yes _____ No

_____ Manufacturing _____ Sales Offices Number of Ohio Employees _____

2. Are products offered in this bid manufactured in Ohio? _____ Yes _____ No

If no, state place of manufacture: _____

3. Are you registered with the Ohio Secretary of State _____ Yes _____ No

(If unsure of registration, call (614) 466-3910 for confirmation and charter number)

Charter Number: _____

4. Bidder hereby certified that each end product, except the end product(s) listed below, is a domestic source and product as defined in the "Buy America Act"; and that components of unknown origin have been considered to have been mined, produced, or manufactured outside the United States. _____ Yes _____ No

Exception(s): _____

Signature of Authorized Officer

Signature of Authorized Legal Representative

AFFIDAVIT IN COMPLIANCE WITH SECTION 5719.042 OF THE
OHIO REVISED CODE

STATE OF _____ }
COUNTY OF _____ } SS:

Personally appeared before me the undersigned, a bidder in a competitive bidding for _____

for a _____ contract to be let by Miami County, Ohio who, being duly cautioned and

sworn makes the following statement with respect to the personal property taxes on the federal tax list of personal property of Miami County, Ohio.

1. That the undersigned at the time of the making this bid on the aforementioned contract was not charged with any delinquent personal property taxes on the general tax list of personal property of Miami County.
2. That this statement is made in compliance with Section 5719.042 to be incorporated into the contract between the parties as provided in that Section of the Ohio Revised Code.

Signature

Title

Subscribed and sworn before me this _____ day of _____, 20____.

Notary Public

My Commission Expires _____

Attachment 5

AFFIDAVIT IN COMPLIANCE WITH SECTION 3517.13 OF THE
OHIO REVISED CODE

STATE OF _____

COUNTY OF _____

}

SS:

Personally appeared before me the undersigned, a bidder in a competitive bidding for _____

(Name of Firm)

for a _____ contract to be let by Miami County, Ohio who, being duly cautioned and

(Type of Product or Service)

sworn makes the following statement with respect to prohibited activities constituting a conflict of interest under Section 3517.13 of the Ohio Revised Code.

1. That no person or persons, whom are owners of at least twenty percent of the above named business or corporation nor any spouse of such person, has made, as an individual, within the two previous calendar years, one or more contributions totaling in excess of one thousand dollars to a candidate for or the holder of a public office having ultimate responsibility for the award of this contract, or to his/her campaign committee, nor have they aggregately given contributions totaling more than one thousand dollars.
2. That no person or persons employed by above named firm, nor their spouses, are in violation of any provision of Ohio Revised Code Section 3517.13.

Signature

Title

Subscribed and sworn before me this _____ day of _____, 20____.

Notary Public

My Commission Expires _____

CIVIL RIGHTS COMPLIANCE CERTIFICATE

Bidder agrees that in the performance of the agreement to provide service and/or implementation services for Miami County Ohio, there shall be no discrimination against an employee because of race, color, sex, sexual orientation, religion, national origin, military or veteran status and/or any other factor as specified in the Civil Rights Act of 1964 and subsequent amendments.

Name of Company

Signature of Representative of Bidder

Date

NON-COLLUSION AFFIDAVIT OF PRIME BIDDER

STATE OF _____

COUNTY OF _____

}

SS:

_____, being first duly sworn, deposes and says that:

(Name)

1. He/She is _____ of _____ the Bidder that has submitted the attached Bid:

(Owner, Partner, Officer, Representative)

(Name of Firm)

2. He/She is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Bid:

3. Such Bid is genuine and is not a collusive or sham Bid:

4. Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this Affidavit, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other bidder, firm or person to submit a collusive or sham Bid in connection with the Contract for which the attached Bid has been submitted or to refrain from bidding in connection with such contract or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices in the attached Bid or of any other Bidder or to fix any overhead, profit or cost element of the bid price or Bid price of any other Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Board of Miami County Commissioners or any person interested in the proposed Contract; and

5. The price or prices quoted in the attached Bid are fair and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this Affidavit.

Signature

Title

Subscribed and sworn before me this _____ day of _____, 20____.

Notary Public

My Commission Expires _____

Evaluation Factors

For the RFP, the County shall use the following factors in evaluation and ranking proposals

| Criteria | Maximum Points |
|---------------------------------------|-----------------------|
| Proposal Quality | 10 |
| Pricing | 40 |
| Timeframe of Implementation | 20 |
| Additional Features Offered | 10 |
| Service Level Agreement | 10 |
| Prior Experience with County of Miami | 5 |
| Contract Terms | 5 |
| TOTAL | 100 |