



#2022-10
REQUEST FOR PROPOSALS
MUNICIPAL LAW OFFICE MANAGEMENT SOFTWARE
COUNTY OF ROCK
JANESVILLE, WISCONSIN

Proposals due in Rock County Purchasing Division by **February 23, 2022 - 12:00 noon (Local time)**

Proposals received after this date and time will be rejected.

Address Proposal to: Shilo Titus, Purchasing Manager
Rock County Courthouse
Purchasing Division
51 S. Main Street
Janesville WI. 53545

MARK SEALED ENVELOPE: #2022-10
MUNICIPAL LAW OFFICE MANAGEMENT SOFTWARE

Rock County reserves the right to accept or reject any or all proposals; to waive any technicality or error in any proposals or part therein, and to accept the same or combinations, in whole or in part, whichever is deemed to be in the best interest of Rock County.

Contracts are awarded to the lowest, most qualified, responsible, and responsive Proposer based on the base Proposal and full consideration of any or all alternatives, as may be in the best interest of Rock County. In determining the award of contract, Rock County will consider the scope of the work involved, timeliness of delivery, competency of Proposer, Proposer's ability to render satisfactory service, and past performance. If two or more Proposers submit identical Proposals, Rock County will make award to Proposer of its choice and such decision will be final.

INSTRUCTIONS FOR PROPOSAL

The proposer is required to submit **six (6) copies (one original marked as such and five copies)** of their proposal in a sealed envelope marked RFP #2022-10 to Shilo Titus, Purchasing Division, 51 South Main, Janesville, WI 53545. All proposals must be received by **12:00 noon (local time), February 23, 2022.** Any proposal submitted after this date and time will be rejected. No faxed or electronic Proposals will be accepted.

Vendors are responsible for ensuring that the above office receives their proposal before the deadline. Proposal "packets" must be clearly labeled with vendor name, return address, proposal title, date, and the name of the vendor's primary contact for proposal questions.

Proposals shall be signed with name typed below signature. Where Proposer is a corporation, Proposal must be signed with the legal name of the Corporation followed by the legal signature of an officer authorized to bind the Corporation to contract.

INQUIRIES

All questions concerning this Request for Proposal must be submitted **in writing** to Shilo Titus. Questions must be received by **February 9, 2022 - 12:00 noon (local time)**. Questions received after this date and time will not be answered. Questions must be e-mailed to shilo.titus@co.rock.wi.us.

No verbal explanation or instructions will be given regarding the meaning of the drawings or specifications during the proposal period. Bidders shall bring inadequacies, omissions, or conflicts to Rock County's attention in writing by the question cut-off date and time. If necessary, answers to questions will be provided to all specification holders in the form of an addendum. Addendum will include a list of each question received and Rock County's response.

ADDENDA

All changes in or interpretations of the specifications prior to Proposal due date will be made by written addenda issued by the Owner to each recipient of the specifications on record. All addenda will be issued no later than 72 hours prior to Proposal due date and time. All addenda or notice of addenda will be posted on Rock County's website, www.co.rock.wi.us.

PROJECTED TIMETABLE

Issue Request for Proposal	February 1, 2022
Legal Notice	February 1, 2022
Questions Due	February 9, 2022
Addenda Issued by	February 14, 2022
Proposals Due	February 23, 2022
Evaluation of Proposals	February 23 – 28, 2022
Governing Committee Approval	March 10, 2022
County Board Approval	March 24, 2022 if needed
Contract Execution	TBD

Vendors not involved in the final selection process will be notified in writing. The above schedule is for informational purposes only and is in no way binding upon Rock County.

VENDOR SUPPLIED DOCUMENTATION AND MATERIALS

All vendor-supplied materials, including the vendor's proposal, become the property of Rock County. We will work with vendors to meet their confidentiality requirements if they are within reason. All vendor confidential material must have each page clearly marked as confidential. Rock County's determination to treat matters as public or confidential under the Wisconsin Open Records Law shall be final.

PROPOSAL AND PRESENTATION COSTS

Rock County will not be liable in any way for any costs incurred by the offerors in the presentation of their proposal in response to this Request for Proposal nor for the presentation of their proposal and/or participation in any discussions or negotiations.

COMPLIANCE WITH THE REQUEST FOR PROPOSAL

Proposals submitted must be in strict compliance with the Request for Proposal. Failure to comply with all provisions on the RFP may result in disqualification. The County reserves the right to reject all submittals or to waive minor defects or irregularities in the submittal. The County further reserves the right, without prior notice, to supplement, amend or otherwise modify this RFP or otherwise request additional information from any and or all respondents. By submitting a proposal, the consultant thereby agrees that the County's decision concerning any submittal in any respect is final, binding, and conclusive upon it for all purposes, and acknowledges that the County in its sole and unqualified discretion may waive or deviate from the procedures and/or timetable outlined.

IMPLIED REQUIREMENTS

Products and services that are not specifically addressed in this Request for Proposal, but which are necessary to provide functional capabilities proposed by the offeror, must be included in the proposal.

NON-DISCRIMINATION

In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s.51.01 (5)(a), sexual orientation, national origin, or military service as defined in §111.355(1), Wis. Stats. This provision 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 contractor further agrees to take affirmative action to ensure equal employment opportunities. The contractor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the non-discrimination clause (Wisconsin Statutes S.16.765 (2)).

INDEMNIFICATION

The contractor to perform services for Rock County shall indemnify, hold harmless, and defend Rock County, its officers, agents, and employees from any and all liability including claims, demands, losses, costs, damages and expenses of any kind and description or damage to person or property arising out of or in connection with or occurring during the course of any agreement between the contractor and Rock County where such liability is founded upon or grows out of the acts or omissions of any agents or employees of the contractor.

INSURANCE REQUIREMENTS

The Contractor further agrees that to protect itself and County it will always during the term of this agreement keep in force and effect worker's compensation, comprehensive general, and auto liability insurance policies by a company or companies authorized to do business in Wisconsin with limits of:

Personal and bodily injury:	Per person	\$1,000,000
	Per accident	\$2,000,000
Property damage:	Each Occurrence	\$500,000
	Aggregate	\$500,000

Coverage shall apply as primary with County named as an added insured. Contractor shall furnish satisfactory proof of insurance to County prior to the date of Contract Execution or commencing work for the County.

REQUEST FOR CLARIFICATION

All requests by Rock County for clarification of proposals will be in writing. Such requests shall not alter the offeror's pricing information contained in its cost proposal.

PROOF OF COMPETENCY OF PROPOSER

Any Proposer may be required to furnish evidence satisfactory to Rock County that the Proposer and proposed subcontractors have sufficient means, expertise, financial ability, and experience in the types of work proposed to assure completion of the Contract in a satisfactory manner.

AGREEMENT DEVELOPMENT

Rock County reserves the right to negotiate with one or more offerors.

MODIFICATION AND WITHDRAWAL

Proposals may not be modified after submittal. Proposers may withdraw their Proposal at any time before Proposal due date and time but may not resubmit them. No Proposal may be withdrawn or modified after opening except where the award of Contracts has been delayed for more than 45 days from the due date.

DISQUALIFICATION

Rock County reserves the right to disqualify Proposals, before and after opening upon evidence of collusion with the intent to defraud or other illegal practices upon the part of the Proposer.

AWARD

Award will not be made to any Proposer in default of a Contract with Rock County, or to any Proposer having as its agent or employee, any individual previously in default or guilty of misrepresentation.

NOTICE TO PROCEED

Written notice of award to the successful Proposer shall be in the form of a Purchase order from Rock County mailed or delivered to the address shown on the Proposal and will be considered sufficient notice of acceptance of Proposal, intent to award the Contract, and "Notice to Proceed" with the work.

BACKGROUND INFORMATION

A. INTRODUCTION

Rock County is seeking sealed proposals for a Municipal Law Office Management software product. The Corporation Counsel's office is responsible for managing all civil legal matters on behalf of Rock County, Wisconsin. Corporation Counsel wishes to implement a comprehensive cloud-based litigation/matter management platform that creates one electronic repository that would contain data, documents, and records relevant to litigation and other matters that Corporation Counsel is involved with. The system must allow staff to easily manipulate, store, catalogue and research data and documents from both archived and electronic sources, including, if possible, integration with Microsoft's office suite (Word, Excel, Outlook, Teams, SharePoint, etc.) The system must also scan, store, index and retrieve, via electronic format, hard copy documents, including some, but not all, of the Department's archived case material. The end goal of this system is to create efficiencies in the maintenance, retrieval, use, and storage of documents and other information to facilitate the ability of the Corporation Counsel's office to go "paperless" by assuming primary file and documentation management role.

Major system should components include:

- Software and Appropriate Licensing
- Software Customization
- Hardware
- Configuration, Installation and Networking
- Integration with Existing Data Systems
- Testing, Debugging and Implementation
- Training: Systems, Network and End-User
- Documentation

B. OVERVIEW OF ROCK COUNTY

Summary

Rock County, population 163,687 in 2020, is a political subdivision of the State of Wisconsin. Rock County is comprised of six Cities, three Villages, 20 Towns, and multiple unincorporated hamlets. The County's Cities include Janesville, Beloit, Edgerton, Milton, Evansville, and Brodhead. The City of Janesville serves as the County seat, is in the County's central portion, and is the largest municipality in the County with a population estimated at over 63,575 in 2010. The County's Villages include Clinton, Orfordville, and Footville.

County Facilities

The main buildings that comprise Rock County's governmental unit include a Health Care Center, Sheriff's Office and Jail, Communications Center, Rock Haven Nursing Home, Public Health building, Job Center, Youth Services Center, Public Works, the County Courthouse, the Regional Airport, the Eclipse Center (located in Beloit) and several satellite office buildings. All buildings except for the Eclipse Center are in the Janesville area, which is the County Seat.

County Staffing

The County currently has approximately 1,600 full and part time employees.

SPECIFICATIONS & SCOPE OF WORK

A. EXPECTATIONS FOR LAW OFFICE MANAGEMENT SYSTEM

Document and Information Management

- Create a cloud-based electronic repository to replace existing paper and electronic storing and archiving of files including litigation, subject-matter files, administrative files, and department specific files.
- Provide effective user controls for access and manipulation of case data including persons or entities involved in case matters, tracking of case progress and stages of litigation, and customizable document taxonomy.
- Provide for a case/matter query functionality that can search many different parameters including, but not limited to, case participants such as witnesses, case parties, or attorneys; document or record type; internal document or record contents; communication contents (e.g. the contents of emails, or other correspondence); case numbers, or other metadata.
- Enhance computer assisted workflow management throughout the Corporation Counsel's Office.
- Streamlined document generation by automating document creation for electronic court filings.
- Integrate with the Microsoft Office suite including Word, Excel, Outlook, and Teams and be able to archive or save documents, records, data, and communications from Office Suite platforms into or out of the software. Ability to integrate with Outlook calendar system to create calendar events, meetings, and notifications based upon case deadlines and timing needs. Platform should be Microsoft Exchange compatible for purposes of scheduling and calendaring.
- Electronically distribute discovery responses either through a web portal and/or email with conformation receipt of discovery retrieval.
- Generate or assist with creation responses to discovery requests including redaction, bates numbering, audio/visual media production such as photos, video, and audio files.

Support/Warranty/Maintenance

- Provides 24/7 troubleshooting and support including FAQs, known issues tracking, email and online live support.
- Provides support resources that are available online.
- Continually monitors all software and hardware included in the system and notifies Rock County as to how to proceed to resolve the issue.
- Provides web analytics tools related to the use of the web portals.
- Provides a hands-on training program for implementing the system.
- Provides user definition and maintenance of system look up tables without programmer intervention.
- Includes complete technical documentation including data dictionary and ERD.
- Provides complete and easy to read end user documentation, including available reports, online functions, screen illustrations, data entry requirements and diagrams of table links.
- Includes software upgrades and bug fixes.
- Provides local access to backup server.
- Employs simultaneous production, testing and training environments.
- Provides ongoing software maintenance and upgrades and supports remote troubleshooting.
- Warranties all software and hardware for the installed system for no less than one year.
- Provides for offline use of system, if cloud-based, to run meetings and develop meeting packets.

B. ROCK COUNTY INFORMATION TECHNOLOGY (RCIT)

1. Existing Hardware and Networks

All computer software and hardware are purchased by Information Technology. The County utilizes many different hardware and software platforms including:

- Microsoft Windows Servers
- Linux Servers
- HP/UX Servers
- Citrix Servers
- Virtual Servers
- Storage Area Network
- Wireless Access Points
- Cloud based services
- Security Appliances
- Oracle Databases
- Microsoft SQL Server Databases
- Laserfiche document management
- Microsoft SharePoint
- Intranet and Internet Web Services

The County has a Wide Area Network which includes all county buildings and several partner locations. The LANs are Ethernet 802.3 networks using industry standard fiber optic and copper cabling, delivering 1GB connections at most end-point locations and 100Mbps at all others.

2. Selection and Implementation Process

Rock County Information Technology (RCIT) shall coordinate the County activities during all phases of this project including vendor selection, contract negotiation, procurement, design, implementation, and post-implementation support. The responses received from vendors will be used by RCIT to prepare for the planned implementation of software by identifying vendors that can scale their systems in terms of capacity and functionality.

Rock County will not guarantee any subsequent purchases of any minimum number of systems or components. The purchase of all software components is contingent on the availability of funds for purchase. Rock County is planning for and has funded a 2019 implementation of software.

C. SYSTEM USERS

All departments within Rock County will potentially have access to the Minutes and Agenda Management System. Additionally, County Board Supervisors and Committee members will also have access to the system via a County supplied Apple iPad.

D. PROPOSAL REQUIREMENTS

1. Hardware and Operating System

Industry accepted hardware and software platforms are required.

2. Federal and State Reporting Requirements

Proposed software must meet all Federal and State reporting requirements for electronic record and retention policies as previously defined by statute.

3. Vendor Profile – Appendix B

Proposal shall include a complete vendor profile presenting topics relevant to the selection process. Appendix B is furnished as a template, but a narrative is acceptable if it includes, but not be limited to the following:

a. Company Information

- Location of the corporate office.
- Number and location of support offices nationwide and worldwide (if applicable).
- Support locations that are particularly relevant to the proposed system software.
- Total number of years the application software has been marketed.
- Total number of employees.
- Total number of employees dedicated to supporting the recommended products.
- Approximate number of personnel that would be assigned to the proposed Rock County system

b. Client List

- A minimum of six installation references.
- At least one other installation reference shall represent an installation with similar volume and similar processing requirements to Rock County.
- At least one installation reference located near Rock County (if possible).

c. References

- At least three government agency references with a preference for at least one county agency and at least one Wisconsin installation.

4. Functionality Matrix – Appendix C

Proposers shall indicate compliance with each requirement in the Functionality Matrix with the methodology contained in the instructions for Appendix C. Failure to provide an answer to each question in the matrix may result in disqualification of proposal.

5. Pricing Information – Appendix D

Proposal shall contain an itemized outline for all costs associated with the installation and maintenance of the Proposer's Minutes and Agenda Management system. Appendix D may be used as a template or a narrative may be attached, but must include at least all the items listed in Appendix D.

Proposals shall include a complete and full inventory of expenses for software and all support services. Vendors shall indicate whether volume-purchasing discounts are available. Expenses must be presented in an un-bundled fashion by itemizing each expense as a separate line item, such as:

- Software costs, including leases and purchase options
- Installation related fees and services
- Training related fees and services
- Maintenance and support costs
- Package modification costs and upgrades required to meet the prescribed business function
- Any other changes that would be billed to Rock County.

6. Vendor Proposal Certification – Appendix E

Proposal must be certified accurate for 120 days from the Proposal Due Date. **Appendix E shall be signed and submitted with Proposal response.**

7. Management Summary - Narrative

Proposal shall include a brief synopsis covering system functionality, implementation, methodology, vendor support, and system growth potential for both capacity and functionality. **Management summary shall not exceed three (3) pages.**

8. System Training - Narrative

Proposal shall include training to be provided at a location determined by Rock County located in Janesville, Wisconsin, during normal office hours. The goal of training will be to make County staff self-reliant in all aspects of system management and operation. The cost of training courses must be included in the Required Training Costs, Appendix D.

Proposal shall include a complete inventory list of the courses and educational materials relevant to this project. Scheduling information for 2019 shall be included. Proposal shall recommend an educational plan for each category of system users. Plan shall include users, operations department, software development/support staff, hardware technology staff, as well as non-technical functional users. Include any third-party vendor courses, which might be beneficial.

9. Documentation - Narrative

Proposal shall include a complete and thorough listing of the documentation available to the customer. Identify and describe any documentation that will be developed for RCIT by the vendor. Each item of customer documentation must indicate whether the vendor will release that documentation for review during the Proposal evaluation period. Vendors willing to accommodate this request shall include copies of customer documentation with their Proposals and any other instructions they might have. Vendors must indicate whether their in-house documentation will be made available for an on-site inspection.

10. Implementation Plan - Narrative

Proposal shall include a complete schedule showing major tasks, time frames, vendor staffing, customer staffing, expenses, and the suggested project management methodology. Specific attention shall be given to acceptance testing methodology, conversions requirements and the phase-in of specialized system tailoring, if any.

11. Maintenance and Support - Narrative

Proposals shall include a discussion of software maintenance services and ongoing technical support. Present all available service options including critical support, standard service, and routine maintenance procedures. For each service option identify the following:

- An explanation of each of the services performed
- Guaranteed response times

12. Contractual Issues – Narrative

Proposal shall include a complete standard purchase contract and a complete maintenance contract for software including all standard wording and vendor typical clauses, guarantees and remedies. All other relevant contractual documents shall be included (i.e., warranty terms and conditions, software licensing, end of lease arrangements).

Proposal shall include a description of how vendor will handle contract clauses. Include the following system requirements:

- Response time
- Total number of system users
- Number of active system users

Notwithstanding the above, Rock County Information Technology (RCIT) is not obligated to use the vendor's standard contract and RCIT reserves the right to further negotiate the terms of said agreement with successful vendor. All contracts shall be reviewed by Rock County's Purchasing Division, Finance Director and Corporation Counsel. The Proposal received from the successful vendor along with this RFP document and any addenda will be attached to and become part of the final contract.

13. Subcontractors and Third-Party Assignments

Proposals shall include full disclosure of subcontractors and third-party assignment used for preparation of the Proposal, support for existing software and hardware, implementation, training and any other supplies or services.

E. PROPOSAL EVALUATION AND AWARD

Award shall be made to the Proposer whose Proposal is determined to be in the best interest of Rock County, taking into consideration cost and the other evaluation factors listed in the RFP.

Vendors responding to this RFP must specifically respond affirmatively or negatively to each specific requirement of the County in the same sequence as the RFP. Vendors must include an explanation of each responses. Additional materials submitted with the responses may be used by the County in furthering its understanding of a vendor's response to a specified or requested requirement.

A Proposal Evaluation Committee has been established and will independently review each Proposal received. After written Proposals have been reviewed, some vendors may be invited to make oral presentations and provide product demonstrations. An unsatisfactory demonstration may be grounds for rejection of a Proposal.

Each response will be evaluated on the vendor's ability to satisfy the requirement as presented in this RFP. Consequently, each vendor shall attempt to present the information in response to this RFP that will instill confidence in the vendor's ability to fulfill the requirements at the lowest possible cost. However, Rock County is not obligated to select the least cost vendor. The evaluation criteria will include any or all the following:

1. Software /Vendor

- a. Overall design match to requirements
- b. Commitment to Government
- c. Flexibility
- d. Ease of change
- e. Reliability of software firm
- f. Ease of use
- g. Number of present users
- h. Warranty provisions/future support
- i. Data security
- j. Customer support
- k. Customer satisfaction
- l. Integration with hardware/operating software
- m. Financial stability
- n. Ability to demonstrate installed base of similar systems

2. Implementation Support

- a. User training
- b. On-site assistance
- c. On-going training
- d. Documentation and manuals
- e. Scope
- f. Quality
- g. Track record meeting schedules and cost estimates
- h. Assistance from other users

3. Cost

- a. Installation
- b. Purchase price and/or lease price for software (and hardware if applicable)
- c. Package modifications and upgrades
- d. Training and implementation assistance
- e. Annual maintenance, software (and hardware if applicable)
- f. Annual Information Technology personnel cost

4. Growth

- a. Expansion without conversion
- b. Package features proposed beyond RFP
- c. Additional packages and features available

5. Quality of Response

- a. Readability and completeness of response

APPENDIX A
PROPOSER CHECKLIST

This checklist has been provided to assist Proposer in complying with RFP requirements. All items listed must be included with the Proposal. To assist in Proposal evaluation, Proposer shall cross-reference the required item with the applicable page in the Proposal.

Proposer shall check off each item as it is assembled into the proposal, enter the page number where the item can be found in the proposal, detach the checklist from the RFP and submit it as part of the Proposal.

<u>Item No.</u>	<u>Format</u>	<u>Proposal Page</u>
_____ Original + 5 Copies of Proposal	As specified in RFP	_____
_____ Proposer Checklist (this form)	Appendix A	_____
_____ Vendor Profile	Appendix B	_____
_____ Desired Functionality Matrix	Appendix C	_____
_____ Pricing	Appendix D	_____
_____ Vendor Proposal Certification	Appendix E	_____
_____ Management Summary	Narrative	_____
_____ System Training	Narrative	_____
_____ Documentation	Narrative	_____
_____ Implementation Plan	Narrative	_____
_____ Maintenance and Support	Narrative	_____
_____ Contractual Issues	Narrative	_____
_____ Subcontractors and Third Party Assignments	Narrative	_____

APPENDIX B
VENDOR PROFILE

Include the following information in your Proposal response marked as Appendix B:

A. Company Information

1. Company Name
2. Website
3. Corporate Address
4. Local Address
5. Telephone Number
6. Fax Number
7. Contact Person Name and Title
8. Contact Person Location
9. Contact Person Telephone Number
10. Contact Person Fax Number
11. E-Mail Address

12. Number of years your company has provided automated agenda workflow solution software like that offered in this RFP.

13. Location of office from which service will be provided to the County of Rock.

14. Number of years has the office that will provide services to the County been open.

15. Number of Staff
 - Nationwide
 - Office serving Rock County
 - Total number of technical staff in office serving Rock County
 - Total number of clients currently supported by the office serving Rock County
 - What portion of the company's business is derived from the automated minutes and agenda management system?

16. Project Manager Information
 - Name
 - Office location
 - Number of similar projects completed
 - Experience of the project manager and project team in handling projects similar in scope to this one.

B. Client List - PLEASE SUBMIT A COMPLETE LIST OF AT LEAST SIX (6) CLIENTS.

Please provide the following information for projects like the scope of services described in this RFP. Automated agenda workflow solution installations at other municipal or governmental agencies are highly desirable. Rock County reserves the right to contact any of the Proposer's clients as deemed necessary during the evaluation process.

- Agency Name
- Agency Address
- Agency Staff Size
- Contact Name
- Contact Telephone Number
- Contact E-Mail Address

C. References

Please provide the following information for a minimum of three (3) agencies in municipal, county, state or federal governments for which Proposer has provided a comparable software solution during the past five (5) years.

- Agency Name
- Department Name
- Agency Address
- Contact Name
- Contact Title
- Contact Telephone Number
- Contact E-Mail Address
- Approximate County (Agency) Population
- General Description of Scope of Work for Automated Agenda Routing Projects
- Time Frame for Provision of Services from Date of Contract Award to Completion
- Completion Date for Services Provided

References may or may not be reviewed or contacted at the discretion of Rock County. Rock County reserves the right to contact references other than, and/or in addition to, those provided by Proposers. Rock County shall not provide information received from references to Proposers.

APPENDIX C

FUNCTIONALITY MATRIX

Document and Information Management System	Y/N
Create a cloud-based electronic repository to replace existing paper and electronic storage	
Database of persons or entities involved in case matters	
tracking of case progress and stages of litigation	
customizable document taxonomy	
Provide for a case/matter query functionality able to search by:.	
case participants such as witnesses, case parties, or attorneys;	
document or record type;	
internal document or record contents;	
communication contents;	
case numbers, or other unique case identifiers;	
or other metadata.	
Provide for version tracking system for document creation and archiving.	
Enhance computer assisted workflow management and document routing throughout different users in the Corporation Counsel's Office;	
document generation by automating document creation for electronic court filings using database parameters;	
Integrate with the Microsoft Office suite including Word, Excel, Outlook, Teams and SharePoint and be able to archive or save documents, records, data, and communications from Office Suite platforms into or out of the software. .	
Ability to integrate with Outlook calendar system to create calendar events, meetings, and notifications based upon case deadlines and timing needs	
Microsoft Exchange compatible for purposes of scheduling and calendaring.	
Electronically distribute discovery responses either through a web portal and/or email with conformation receipt of retrieval.	

Generate or assist with creation responses to discovery requests including redaction, bates numbering, audio/visual media production such as photos, video and audio files.	
Optional/Alternative Features:	
Comprehensive contract tracking and archiving system designed to track contract negotiation, approval, and archiving.	
Insurance program and policy coverage tracking across multiple policy types and programs.	

APPENDIX D
PRICING

The Proposal pricing page must itemize the cost to the County for all services to perform the scope of services outlined in the RFP. A narrative shall be attached to clarify any pricing data submitted (e.g., hourly rates).

1. Software Licensing Costs - Identify licensing terms and conditions (e.g. site license, concurrent users, per seat license, unlimited subscription licensing)
2. Training Costs (including travel if onsite) - Identify training components
3. Configuration and Implementation - Identify configuration and implementation components
4. Total Initial Project Costs
5. Yearly Maintenance or Subscription Costs



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APPENDIX E
VENDOR PROPOSAL CERTIFICATION

The following certification must be submitted with Proposal.

I hereby certify that all prices included in this Proposal are accurate and binding for one hundred twenty (120) days from the Proposal due date.

I further certify that the total costs accurately reflect the total Proposal cost, and that the company which I represent will deliver and install, and coordinate delivery and installation of the proposed applications software, hardware, and systems; train staff and provide documentation for the total amount of \$ _____ (see attached pages for detail).

The contractor to perform services for Rock County shall indemnify, hold harmless, and defend Rock County, its officers, agents, and employees from any and all liability including claims, demands, losses, costs, damages and expenses of any kind and description or damage to person or property arising out of or in connection with or occurring during the course of any agreement between the contractor and Rock County where such liability is founded upon or grows out of the acts or omissions of any agents or employees of the contractor.

Authorized Signature

Date

Printed Name

Title

Company

Address

Telephone

Fax

E-Mail