



## Legislation Text

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**File #:** 18-0246, **Version:** 1

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Recorder-Clerk recommending the Board consider the following:

- 1) Authorize the Recorder-Clerk to negotiate a three (3) year Agreement for Services with SouthTech Systems for the provision of a replacement Document Recording and Clerk Management System for a one time not to exceed amount of \$256,962 plus applicable taxes, one-time SQL server licenses not to exceed \$20,000 plus applicable taxes, and annual maintenance and support not to exceed \$46,260 per year; and
- 2) Authorize the Purchasing Agent or their designee to execute said Agreement, contingent upon Counsel and Risk Management review.

**FUNDING:** Recorder-Clerk Special Revenue Funds.

**DEPARTMENT RECOMMENDATION:**

Recorder-Clerk recommending the Board consider the following:

- 1) Authorize the Recorder-Clerk to negotiate a three (3) year Agreement for Services with SouthTech Systems for the provision of a replacement Document Recording and Clerk Management System for a one time not to exceed amount of \$256,962 plus applicable taxes, one-time SQL server licenses not to exceed \$20,000 plus applicable taxes, and annual maintenance and support not to exceed \$46,260 per year; and
- 2) Authorize the Purchasing Agent or their designee to execute said Agreement, contingent upon Counsel and Risk Management review.

**DISCUSSION / BACKGROUND:**

The AtPac Recording Management system was assigned to SouthTech Systems in April 2017, after being in use for 19 years. At the time of the assignment, AtPac staff was transferred to SouthTech along with the business systems, and SouthTech informed the County that they would support the AtPac system only through the end of the calendar year 2018. SouthTech has continued to provide assistance to the Recorder-Clerk moving data from the mainframe, as well as providing ongoing redaction of social security numbers as required by law. County staff have built a business relationship with the AtPac/SouthTech team over the years and have established a level of mutual trust to ensure business continuity for the County.

SouthTech Systems offers a comprehensive Document Recording Management System that is used by multiple California Counties including: Orange, San Mateo, Merced, Imperial and most recently Modoc. Orange County is the 2nd largest county in California and they have been a customer of SouthTech for 18 years. SouthTech also provides the County Clerk system for Orange, Fresno, San Mateo, Imperial, Lake, Merced, Marin, Mariposa, Mendocino, Sacramento and Solano. Additionally, SouthTech is the established vendor for the County's electronic Form 700-Statement of Economic Interests process.

The SouthTech system provides consistency and fit with the Organization's Mission. At the Recorder-Clerk's request, SouthTech conducted a product demonstration of the entire Recorder and Clerk

suites for the benefit Recorder-Clerk staff. The general opinion of the staff is that they like the SouthTech System, which provides more modern automation, updated programs and more features throughout than the current system.

A team consisting of the Recorder-Clerk, the Assessor, the Treasurer-Tax Collector, the Director of Information Technologies and two Chief Administrative staff was convened to review the business case analysis for the SouthTech software solution, including functionality of the system as well as recommended timing of a software implementation that fit with other implementations during the calendar 2018 year (FENIX, Megabyte).

After a thorough evaluation of the alternatives including launching a Request for Proposals (RFP) it was decided that the current vendor, SouthTech of Riverside, California, provides the most robust and cost effective application meeting the needs of the Recorder-Clerk functions and avoids the potential risks associated with an RFP. Given the timeframe to conduct an RFP process and contract negotiations (minimum of 120 days) it may be difficult to implement a new system prior to the end of calendar 2018. Additionally, it may be difficult, with the available resources, to craft an RFP document that would yield accurate cost proposals from vendors. The Recorder-Clerk is therefore recommending the SouthTech system. This solution will result in keeping the ongoing and trusted relationship with the current vendor, and ensure business continuity.

The SouthTech team has submitted a proposal that provides the Recording management system at a significant multi-system discount from list price of 51% and has also submitted a proposal for the Clerk modules at a multi-system discount of 90% off list price. This represents a combined total discount of 67.1%. The projected implementation is 90 days. SouthTech is very flexible and has offered to maintain their competitive pricing and work with County staff to make the transition at the most convenient time, which would be in July 2018, when IT resources become available for the implementation. Annual maintenance and support costs reflect an increase of approximately \$10,000 compared to current costs.

The SouthTech system is fully integrated with MegaByte, the new County Property Tax System, and the vendor will conduct business process analysis with Recorder-Clerk staff prior to implementation.

#### **ALTERNATIVES:**

The Board could require an RFP for this software application. However, given the extensive time for the RFP process, demonstrations and contract negotiations, it may be difficult to implement a new system prior to the end of 2018.

#### **OTHER DEPARTMENT / AGENCY INVOLVEMENT:**

Chief Administrative Office, Information Technologies, Assessor, Treasurer-Tax Collector

#### **CAO RECOMMENDATION:**

It is recommended that the Board approve this item.

#### **FINANCIAL IMPACT:**

The purchase will be budgeted in FY 2018-19 and will be funded from Recorder-Clerk Special Revenue Funds.

#### **CLERK OF THE BOARD FOLLOW UP ACTIONS**

**STRATEGIC PLAN COMPONENT:**

N/A

**CONTACT**

Bill Schultz, Recorder-Clerk