



**CLAY COUNTY  
PURCHASING DEPARTMENT  
REQUEST FOR PROPOSAL (RFP)**

|                    |  |                                 |                               |
|--------------------|--|---------------------------------|-------------------------------|
| <b>RFP NO:</b>     | <b>68-21</b>                               | <b>PURCHASING SPECIALIST II</b> | <b>PATRICK WEST</b>           |
| <b>TITLE:</b>      | <b>PERCEPTIVE CONTENT GENERAL SERVICES</b> | <b>EMAIL:</b>                   | <b>PWEST@CLAYCOUNTYMO.GOV</b> |
| <b>ISSUE DATE:</b> | <b>11/9/2021</b>                           | <b>PHONE NO:</b>                | <b>816-407-3630</b>           |

**PROPOSAL RESPONSES MUST BE RECEIVED NO LATER THAN:  
12/9/2021 AT 2:00 PM CENTRAL TIME.  
PROPOSAL RESPONSES WILL BE OPENED AND READ ALOUD AT 3:00 PM CENTRAL TIME.**

**SUBMITTAL INSTRUCTIONS:** In an effort to support the County's initiative for conservation, it is preferred that the Request for Proposals (RFP) be submitted via [www.PublicPurchase.com](http://www.PublicPurchase.com). Sealed RFPs may be delivered to the Clay County Purchasing Department prior to the return date and time. Print the **Sealed RFP Label** found in Attachment 1 or type **RFP Number, RFP Title** and **Return Due Date** on the lower left hand corner of the envelope or package. In order for a response to be considered complete, the Clay County document **MUST** be completed in its entirety which includes this cover page. All subsequent pages **MUST** also be initialed and the Terms and Conditions Acknowledgement form **MUST** be signed.

**RETURN RFP TO:**  
**CLAY COUNTY**  
**ATTN: ~ PURCHASING DEPARTMENT**  
**1 COURTHOUSE SQUARE**  
**3rd FLOOR COMMISSION DESK**  
**LIBERTY, MISSOURI 64068**

**AGREEMENT PERIOD: DATE OF AWARD THROUGH ONE YEAR; WITH FOUR ONE-YEAR RENEWALS**  
**DELIVER SUPPLIES/SERVICES/INVOICES FOB (Free On Board) DESTINATION TO THE FOLLOWING ADDRESS:**

**COUNTY COLLECTOR'S OFFICE**  
**1 COURTHOUSE SQUARE**  
**LIBERTY, MO 64068**

By signing this RFP cover page, the vendor shall hereby declare understanding, agreement and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all requirements and specifications contained herein and the Contract Terms and Conditions. The vendor shall further agree that the language of this RFP shall govern in the event of a conflict with their proposal. In addition, the vendor shall further agree that upon receipt of an authorized purchase order from Clay County or when a Vendor Agreement is fully executed by an authorized agent of Clay County, a binding agreement shall exist between the vendor and Clay County.

**SIGNATURE REQUIRED**

|  |  |                             |                           |
|--|--|-----------------------------|---------------------------|
|  |  |                             |                           |
| <b>Company Name</b>  | <b>Authorized Representative (Print)</b> |                             | <b>Title</b>              |
| <b>Street Address</b>  |  | <b>Authorized Signature</b> |                           |
| <b>City/State/Zip</b>  | <b>County</b>                            | <b>Date</b>                 | <b>Company Tax ID No.</b> |
| <b>Telephone No.</b>   | <b>Facsimile No.</b>                     | <b>E-Mail</b>               |                           |
| <input type="checkbox"/> Corporation <input type="checkbox"/> Individual <input type="checkbox"/> State/Local Government <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> IRS Tax-Exempt |  |                             |                           |
| <b>Vendor Tax Filing Type with IRS (Check One)</b>   |  |                             |                           |

## 1. INTRODUCTION AND GENERAL INFORMATION

*This section of the RFP includes a brief introduction and background information about the intended acquisition for which the requirements herein are written. The contents of this section are intended for informational purposes and do not require a response.*

### 1.1 Purpose:

1.1.1 This document constitutes a request for competitive, sealed proposals from prospective vendors for Perceptive Content General Services for Clay County Collector's Office in accordance with the requirements and provisions stated herein.

1.1.2 RFP Document Contents:

- Introduction and General Information
- Scope of Work/Functional Specifications
- Meeting Information Page
- Agreement Terms and Conditions Acknowledgement Form
  
- Exhibit A - Pricing
- Exhibit B - Experience and Expertise
- Exhibit C - Project Approach
- Exhibit D - Miscellaneous Information
  
- Attachment 1 – Sealed RFP Label

### 1.2 Questions:

1.2.1 Questions relating to the RFP must be submitted via the [www.PublicPurchase.com](http://www.PublicPurchase.com) website or e-mailed to [Purchasing@ClayCountyMo.gov](mailto:Purchasing@ClayCountyMo.gov)

1.2.2 **All questions and issues should be submitted no later than Monday, November 29, 2021** If not received prior to the aforementioned date, the Clay County Purchasing Department may not be able to fully research and consider the respective questions or issues.

### 1.3 Background Information:

1.3.1 The Clay County Collector's Office maintains a variety of software, hardware, tax documents, images and other unstructured data for the collection of County tax payments from Personal Property, Real Estate and Tax Sales.

1.3.2 The Clay County Collector's Office seeks to provide an easy interface between Internal and External client services through its html web applications, software, hardware, and find ways to integrate existing and future data, tax records, and tax payments.

1.3.4 Although an attempt has been made to provide accurate and up-to-date information. Clay County does not warrant or represent that the background information provided herein reflects all relationships or existing conditions related to this Request for Proposal.

### 1.4 Estimated Quantities:

1.4.1 The County shall not guarantee any minimum or maximum amount of the vendor's services that may be required under the Agreement.

- a. The vendor shall provide products/services on an as needed basis.
- b. The County shall not guarantee any usage of the contract whatsoever.

Vendor's Initials: \_\_\_\_\_

**1.5 Award Determination**

- 1.5.1 Any award of Agreement must be approved by the County Commissioners and shall be made by notification from the Purchasing Department to the successful bidder.
- a. Clay County shall have the right to make awards by items, or as an all or none basis.
  - b. Clay County may make awards to multiple vendors.
  - c. The grouping of items and/or multiple vendor awards shall be determined by Clay County based upon factors such as item similarity, location, administrative efficiency or other considerations in the best interest of Clay County.

**2. SCOPE OF WORK**

*This section of the RFP includes requirements as well as desirable attributes and provisions relating specifically to the scope of work requirements of Clay County. The contents of this section include mandatory requirements that will be required of the successful vendor and subsequent vendor. The vendor is requested to provide responses to the requirements/desired attributes in this section pursuant to the directions identified herein. The vendor's response, whether responding to a mandatory requirement or a desired attribute, shall be binding in the event the proposal is accepted by Clay County. The vendor must provide all costs necessary to meet the mandatory requirements and the fulfillment of any desirable attributes by the vendor (if any) in the appropriate sections of Exhibit A, Pricing Pages.*

**2.1 Specific Requirements:**

- 2.1.1 The vendor shall provide a Perceptive Content General Services, which meets or exceeds the specifications contained in this document.
- a. Vendor shall provide a scalable content services platform to manage the complete content lifecycle of information from capture to disposition.
  - b. Vendor shall provide flexible solutions across multiple County applications.
- 2.1.2 The Clay County Collector's Office desires a vendor to provide and install Perceptive Content General Services to maintain a variety of software, hardware and documents including but not limited to: standard correspondence, electronic forms and documents, faxes, digital images, scanned documents, tax statements, payments, word processor and html web applications.
- a. Documents flows will come from internal and external clients through in-person contact and desktop environments such as; Microsoft Office, internet interface, scan captured images, e-mails, managed inbound faxes, communications or other documents, and computer generated data and reports.
- 2.1.3 The Clay County Collector's Office goals and objectives also include but are not limited to:
- a. Efficiency
  - b. Reducing paper consumption and workflow
  - c. Replacing existing manual storing and archiving of hard copy files
  - d. Depositing existing electronic records from all County Collector systems
  - e. Providing effective controls for access and manipulation of data
  - f. More rapid searching for data
  - g. Securing archived materials in an electronic format
  - h. Enhancing computer assisted workflow management
  - i. Process Design; utilizing data collection devices where it is more productive to do on-the-spot, or remotely, in order to reduce processing steps
  - j. Version control
  - k. Retention policies with option of auto-purge
  - l. eSignature
  - m. Sharing/Export (pdf option; ability to send via email)
  - n. Encryption
  - o. OCR/Full Text Indexing
  - p. Cloud Storage
  - q. Multiple Print options (page or full document)

Vendor's Initials: \_\_\_\_\_

- r. User friendly and easy to understand and organize, intuitive
- s. Extensive storage capability
- t. Barcode scanning functionality via Citrix after upgrade to Perceptive Content 7.3
- u. UAT Support / Testing

- 2.1.4 The interface for the management of the new Perceptive Content General Services and for the clients who use it is to be simple, universal and easily configured.
- a. Internal clients who utilize it should not have to navigate a complex process in order for their documents to become part of a document repository nor should there be a complex interface to do searching, retrieval and printing.
  - b. External Clients may be accessing the system as application clients, inter/intranet browsers or via another application interface.
- 2.1.5 Present Technical Environment
- a. The following table provides information about Clay County Collector’s current technical setting.

| Clay County Collector’s Office Technical Data |   |
|---|---|
| Component                                     | Minimum Specifications  |
| Server  | <ul style="list-style-type: none"> <li>• Physical or VMware</li> </ul>  |
| Operating System                              | <ul style="list-style-type: none"> <li>• Microsoft Windows Server 2016</li> </ul>   |
| DBMS  | <ul style="list-style-type: none"> <li>• MS SQL Server 2016</li> <li>• MySQL</li> </ul>   |
| Storage                                       | <ul style="list-style-type: none"> <li>• Server attached storage</li> </ul>   |
| Application Architecture                      | <ul style="list-style-type: none"> <li>• Windows .NET framework 2.0</li> </ul>  |
| Enterprise Backup                             | <ul style="list-style-type: none"> <li>• Unitrends</li> </ul>   |
| Reporting Services                            | <ul style="list-style-type: none"> <li>• Crystal Reports</li> </ul>   |
| Authentication Services                       | <ul style="list-style-type: none"> <li>• Active Directory</li> </ul>  |
| Email Services                                | <ul style="list-style-type: none"> <li>• MS Exchange 2016</li> </ul>  |
| Message and Email Interface                   | <ul style="list-style-type: none"> <li>• Outlook 2016 and OWA</li> </ul>  |
|   | <ul style="list-style-type: none"> <li>•</li> </ul>   |
| Network Communication Protocol                | <ul style="list-style-type: none"> <li>• TCP/IP</li> </ul>  |
| Network Connection                            | <ul style="list-style-type: none"> <li>• client to server: 100 megabits</li> <li>• server to server: 1 gigabit</li> </ul>   |
| Desktop                                       | <ul style="list-style-type: none"> <li>• OS – Microsoft Windows 10</li> <li>• Memory - 2GB, 667MHz</li> <li>• Storage –80GB</li> <li>• Monitor Resolution – 1024x768 or higher</li> </ul> |

- 2.1.6 The Collector’s Office intent to implement an approach to an enterprise wide electronic management system that integrates all structured and unstructured data resources to better meet the needs of its staff to include a cohesive workflow and data management functions.

**2.2 Miscellaneous Requested Information:**

- 2.2.1 The vendor should respond to the information requested in all sections and all exhibits.

**3. RFP OPENING**

- 3.1.1 RFP Responses will be read aloud at 3:00 P.M. on DECEMBER 9, 2021 in the Purchasing Department. Location subject to change.

Vendor’s Initials: \_\_\_\_\_

**4. AGREEMENT TERMS AND CONDITIONS ACKNOWLEDGEMENT FORM**

The undersigned vendor has read, understood, and accepted the Terms and Conditions as published on the Clay County Official Website located at:

[https://www.claycountymo.gov/application/files/1515/9923/0486/CONTRACT\\_TERMS\\_AND\\_CONDITIONS.pdf](https://www.claycountymo.gov/application/files/1515/9923/0486/CONTRACT_TERMS_AND_CONDITIONS.pdf)

All terms and conditions as stated shall be adhered to by vendor upon acceptance of Agreement. Vendors enter into this agreement voluntarily, with full knowledge of its effect.

\_\_\_\_\_  
Vendor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Vendor Name

Vendor's Initials: \_\_\_\_\_

**EXHIBIT A  
Pricing Pages**

**PRICING TABLE 1: REQUIRED PRICING**

The vendor shall complete the following pricing table(s) (or in a form similar to the pricing tables) and provide firm, fixed pricing necessary to meet the mandatory requirements of the RFP. If additional information is necessary for any table below, please use a separate sheet of paper noting table designation.

| DESCRIPTION                                  | UNIT OF MEASURE | UNIT COST | QUANTITY | EXTENDED COSTS |
|--|-----------------|-----------|----------|----------------|
| Configuration                                |                 | \$        |          | \$             |
| Hardware                                     |                 | \$        |          | \$             |
| Hardware Installation                        |                 | \$        |          | \$             |
| Software                                     |                 | \$        |          | \$             |
| Software Installation (including interfaces) |                 | \$        |          | \$             |

**PRICING TABLE 2: OTHER REQUIRED PRICING**

The vendor must state below all other applicable costs necessary to satisfy the mandatory requirements of the RFP. Unless stated in Exhibit A, the County shall assume that absolutely no other fees or charges, will be assessed to the County whatsoever in connection with Perceptive Content General Services herein and to satisfy the RFP requirements.

| DESCRIPTION / COMMENTS   | UNIT OF MEASURE | UNIT PRICE |
|--|-----------------|------------|
| On-going maintenance/support costs (indicate how long these costs are valid) |                 | \$         |
| Scanning services costs  |                 | \$         |
| Training personnel on the use of the system                                  |                 | \$         |
| Travel   |                 | \$         |
|  |                 |            |
|  |                 |            |
|  |                 |            |
|  |                 |            |

**PRICING TABLE 3: OPTIONAL PRICING**

The vendor may provide firm, fixed pricing for optional features, expansion options and/or enhancements for the proposed Perceptive Content General Services solution. Also, list any pricing discounts.

| DESCRIPTION / COMMENTS | UNIT OF MEASURE | UNIT PRICE |
|------------------------|-----------------|------------|
|                        |                 |            |
|                        |                 |            |
|                        |                 |            |
|                        |                 |            |
|                        |                 |            |

Vendor's Initials: \_\_\_\_\_

**EXHIBIT A, continued**

**PRICING TABLE 4: FEE SCHEDULE**

If additional services are requested by the County, the vendor shall prepare and submit to the County an estimate of the total cost associated with such additional services. The vendor must indicate in the pricing table below the firm, fixed hourly rate for the personnel job classification that may be necessary to fulfill the requirements of the RFP.

**TASK/PERSONNEL BREAKDOWN**

SCHEDULE OF HOURLY BILLING RATES FOR SERVICES

| PERSONNEL CLASSIFICATION | TYPICAL WORK TASKS | HOURLY RATE |
|--------------------------|--------------------|-------------|
|                          |                    |             |
|                          |                    |             |
|                          |                    |             |
|                          |                    |             |
|                          |                    |             |

**ADVANCE PAYMENT OPTION**

Vendors may indicate below a percentage deposit required to begin work if the total cost of proposal exceeds \$25,000.00.

\_\_\_\_\_ %

Vendor's Initials: \_\_\_\_\_

**EXHIBIT B  
Experience and Expertise**

The evaluation of the vendor’s experience and expertise shall be subjective based on the requirements stated herein. Therefore, the vendor should present detailed information regarding current and/or prior experiences in providing the services and expertise of the organization as well of its personnel. The County shall have the right to use the information provided herein, including information gained from any other source, in the evaluation process.

**B.1 EXPERIENCE:**

A MINIMUM of 2 years experience is required of the successful vendor, in similar services, as described in the scope. Experience and references provided by vendors shall be verified and will be a significant factor in the evaluation. Vendors should provide the information below.

How many years has your company been in the Perceptive Content General Services business? \_\_\_\_\_

List a minimum of three (3) references showing Agreements held by your company providing the same or similar services for other public entities, local government or private companies.

| Reference No. 1 of 3                                |  |
|---|--|
| Company/Organization Name:                          |  |
| Address:  |  |
| Name of Contact and Title:                          |  |
| E-mail Address:                                     |  |
| Telephone No.:                                      |  |
| Agreement or Service Period<br>(dates of services): |  |
| Reference No. 2 of 3                                |  |
| Company/Organization Name:                          |  |
| Address:  |  |
| Name of Contact and Title:                          |  |
| E-mail Address:                                     |  |
| Telephone No.:                                      |  |
| Agreement or Service Period<br>(dates of services): |  |
| Reference No. 3 of 3                                |  |
| Company/Organization Name:                          |  |
| Address:  |  |
| Name of Contact and Title:                          |  |
| E-mail Address:                                     |  |
| Telephone No.:                                      |  |
| Agreement or Service Period<br>(dates of services): |  |

Vendor’s Initials: \_\_\_\_\_



**EXHIBIT B, continued**

**B.2 EXPERTISE:**

**PERSONNEL QUALIFICATIONS**

Vendors should provide the information below.

Indicate person who will be supervising project(s) and years of experience in similar work.

Name: \_\_\_\_\_ No. of Years \_\_\_\_\_

Type of Experience: \_\_\_\_\_

Complete the following for employees that would be working on this project. List any previous work directly relating to the RFP specifications that have been performed for other public entities, local government or private companies in the last five years. Attach a separate sheet of paper if needed.

| EMPLOYEE NAME | QUALIFICATIONS | EXPERIENCE/TRAINING/CERTIFICATIONS |
|---------------|----------------|------------------------------------|
|               |                |                                    |
|               |                |                                    |
|               |                |                                    |
|               |                |                                    |
|               |                |                                    |
|               |                |                                    |
|               |                |                                    |

Vendor's Initials: \_\_\_\_\_

**EXHIBIT C**  
**Project Approach**

The evaluation of the vendor's proposed method of performance/project approach shall be subjective based on the requirements stated herein. Therefore, the vendor should present detailed information regarding the proposed method of performance/project approach. The County shall have the right to use this information, including information gained from any other source, in the evaluation process.

It is the vendor's responsibility to make sure all Perceptive Content General Services proposed are adequately described. It should not be assumed that the evaluator has specific knowledge of the services proposed; however, the evaluator does have sufficient technical/business background to conduct an evaluation when presented complete information.

**C.1 PROJECT APPROACH INFORMATION**

1. Describe, in detail, the methodology that your firm expects to use and explain its approach to conducting this project.
2. What were the key factors that contributed to major problems in establishing other projects?
3. Describe the qualifications of your Project Team who will be assigned to this project and demonstrate that this team has a track record of successful outcomes in similar engagements. Include a timeline that identifies and shows the duration of each major component of the work and the time required to develop, install, and fully implement the pilot projects, including time for training.
4. Indicate how frequently software upgrades and new releases (versions) of software are issued, and specify whether such upgrades or new releases are included either as part of the initial purchase price or as part of any maintenance and/or support fees that may be applicable.
5. Describe the ongoing maintenance (e.g., database administration and database management system maintenance) tasks to be performed by Collector's Office that are required for your system on a daily, weekly, monthly or annual basis.
6. In addition to the specific services and equipment requested by this RFP, identify and/or recommend any additional services, products, special knowledge or skills provided by your firm that would be beneficial to the Collector's Office in meeting its service and equipment needs. Identify any costs for such services, products, knowledge, or skills. If there is a better way for the County Collector's Office to define the services that it has requested herein please provide proposed methods to achieve better pricing and/or service.

Vendor's Initials: \_\_\_\_\_

**EXHIBIT D  
Miscellaneous Information**

**D.1 LOCAL GOVERNMENT USE (COOPERATIVE PROCUREMENT):**

1) This section is optional, it will not affect proposal award. If the County awarded you the proposed Agreement, would you sell under the prices and terms of this Agreement to any Municipal, County Public Utility, Hospital, Educational Institution, or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the Greater Kansas City Metropolitan Trade Area. (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this Agreement.)

YES:  NO:  INITIALS: \_\_\_\_\_

- 2) Sales shall be made in accordance with the prices, terms, and conditions of the RFP and any subsequent term Agreement.
- 3) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the Agreement unless they are specifically named in the RFP as a joint participating entity.
- 4) All sales to other jurisdiction shall be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other Agreement administration shall be the responsibility of the ordering jurisdiction.
- 5) The Purchasing Manager shall be responsible to handle the solicitation and award the Agreement. The Purchasing Manager shall have the sole authority to modify the Agreement and handle disputes regarding the substance of the Agreement.
- 6) Each jurisdiction that is a party to the joint bid has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

**D.2 WEBSITE**

- 1) Does your company have a website? YES:  NO:
- 2) If yes please provide the website address:

**D.3 EMPLOYEE BIDDING/CONFLICT OF INTEREST:**

Vendors who are elected or appointed officials or employees of Clay County or any political subdivision thereof, serving in an executive or administrative capacity, must comply with sections 105.450 to 105.458, RSMo, regarding conflict of interest. If the vendor or any owner of the vendor’s organization is currently an elected or appointment official or an employee of Clay County or any political subdivision thereof, please provide the following information.

|   |  |
|---|--|
| Name and title of elected or appointed official or employee of Clay County or any Political sub-division thereof:   |  |
| If employee of Clay County or Political sub-division thereof, provide name of Clay County entity or political sub-division where employed:                    |  |
| Percentage of ownership interest in vendor’s organization held by elected or appointed official or employee of Clay County or political sub-division thereof: |  |

Vendor’s Initials: \_\_\_\_\_

**ATTACHMENT 1**  
**Sealed RFP Label**

***PLEASE ATTACH LABEL TO OUTSIDE OF RFP PACKAGE***

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**SEALED RFP RESPONSE ENCLOSED**

DELIVER TO:

CLAY COUNTY ~ PURCHASING DEPARTMENT  
1 COURTHOUSE SQUARE  
3<sup>RD</sup> FLOOR COMMISSION DESK  
LIBERTY, MO 64068

RFP No.: 68-21    DATE: 12/9/2021

RFPs MUST BE RECEIVED AT **2:00 pm CENTRAL TIME**  
**DESCRIPTION: PERCEPTIVE CONTENT GENERAL SERVICES**

SPECIFY VENDOR NAME: \_\_\_\_\_

SPECIFY VENDOR'S CITY, STATE LOCATION: \_\_\_\_\_

City, State Location

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Vendor's Initials: \_\_\_\_\_