



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Assessor – County Clerk - Recorder



DATE: May 5, 2014
BOARD MEETING DATE: July 15, 2014
SPECIAL NOTICE/HEARING: None
VOTE REQUIRED: Majority

TO: Honorable Board of Supervisors

FROM: Mark Church, Assessor-County Clerk-Recorder
& Chief Elections Officer

SUBJECT: Amendment to the Agreement with SouthTech Systems, Inc.

RECOMMENDATION:

Adopt a Resolution authorizing an amendment to the agreement with SouthTech Systems, Inc. for a software system upgrade for the term of August 1, 2014 through February 28, 2015, in an amount not to exceed \$225,000.

BACKGROUND:

In 2002, the Assessor-County Clerk-Recorder replaced its Eagle CRIS+ recorder's system with SouthTech Systems' (STS) software, to enable the efficient exchange of data and documents within and between the workflows of the Assessor, County Clerk and Recorder. In 2002 this Board waived the RFP process allowing a contract with STS as the only qualified provider. (Reso. 065619, 10/22/02, \$652,321). STS is a California company with proven performance in many public sector arenas and competitive prices. STS's robust and flexible package of eleven software programs efficiently manage the flow of data and document image files within and between the Recorder, Clerk and Assessor processing workflows. Subsequent agreements have provided for continued licensing, maintenance and technical support through June 30, 2014 (Reso. 066668, 6/8/04, NTE \$185K; 13000-07-C011, 6/15/06, NTE \$100K; 13000-08-C004, 5/25/07, NTE \$100K; 13000-09-C036, 7/10/08, NTE \$100K; 13000-11-C025, 6/8/10, NTE \$100K; 13000-13-D002, 6/30/12, NTE \$100K), and software modifications to enable electronic recordation and other improvements (Reso. 066131, 7/15/03, NTE \$59,200; Reso. 069727, 10/7/08, NTE \$263,250; 13000-10-C183, 1/22/10, NTE \$50K).

DISCUSSION:

This Agreement provides for the upgrade of the VitalDocs and LandDocs programs, related maintenance and user support, including, diagnosing and correcting any irregularity, error, problem, or material defect in performance or network maintenance. The upgrade will increase processing efficiency, accuracy, system architecture, workflow and user interfaces. The verification module will improve index accuracy, and the

administration module will streamline administration and configuration processes for user interfaces, data cross-referencing, and user assignments. The VitalDocs program processing customer requests for vital records meets legislative mandates that prohibit unauthorized viewing and provides an audit trail of user requests. The upgrade will also improve fee accounting, management, reporting and printing functions.

Throughout the contractual relationship, STS has provided proprietary software and services that met the Assessor-County Clerk-Recorder's specifications, including custom applications to meet the needs of the Department, County's business partners and other Departments. STS remains uniquely qualified and a waiver of the request for proposal process is warranted.

The Agreement includes all provisions that are required by County Ordinance Code and administrative memoranda, including but not limited to insurance, hold harmless, nondiscrimination, equal benefits and jury service policy. County Counsel has reviewed and approved this Agreement and Resolution as to form. The Information Services Department has reviewed and approved the Agreement as to content.

Approval of this Resolution contributes to the Shared Vision 2025 outcome of a Collaborative Community by building a technology infrastructure that is fiscally accountable, and responsive to evolving needs, and mindful of future impacts. This investment will reduce costs and increase customer satisfaction through increased efficiencies in a core, revenue-generating business process.

Performance Measure(s):

Measure	FY 2012-13 Actual	FY 2013-14 Target	FY 2014-15 Target
Number of documents recorded per Recorder staff member	25,508	26,750	28,600
Percent of documents recorded electronically	20%	25%	30%

FISCAL IMPACT:

The term of the Amendment is seven months, from August 1, 2014 through February 28, 2015, with a maximum fiscal obligation of \$225,000. Installment payments are tied to successful completion of project milestones. There will be no Net County Cost. Funds are provided for in the current budget, from the Recorder's Modernization Trust Fund Account.