

MOBILE COUNTY COMMISSION

205 Government Street 8TH FL South
Mobile, Alabama 36644

BID INVITATION

NO. 19-24

MARCH 28, 2024

In accordance with General Act No. 217, Special Session 1967, notice is hereby given that the Mobile County Commission, Mobile, Alabama, will receive bids on the following items:

FORTIS COMPREHENSIVE CONVERSION FOR MOBILE COUNTY COMMISSION AS PER ATTACHED SPECIFICATIONS:

Any questions or comments concerning the bid requirements must be brought to the attention of Susan Holland, Purchasing Agent, 251-574-8613, susan.holland@mobilecountyal.gov prior to the bid opening or will be forever waived.

All bidders shall furnish a five (5%) bid bond on any contract exceeding \$30,000: provided that bonding is available for services, equipment or materials. Bid bond will be accepted in the form of certified check, cashier check, postal money order, etc.

Out of State Corporations shall furnish a Certificate of Authority to transact business in the State of Alabama. Out of State limited liability companies shall furnish proof of registration to transact business in this state. Alabama law requires that a successful bidder, if it has employees in the State of Alabama, provide proof of enrollment in E-Verify prior to the award of a contract. (See enclosed notice which must be completed, signed and returned with your bid.)

If applicable to a contract resulting from this invitation, the successful bidder must comply with the Contractor Felony Investigation Policy, available in the Purchasing Department or at mobilecountyal.gov.

THE MOBILE COUNTY COMMISSION DOES NOT DISCRIMINATE ON THE BASIS OF RACE, AGE, SEX, NATIONAL ORIGIN, RELIGION, OR DISABILITIES.

F.O.B. Mobile DATE OF DELIVERY _____ TERMS _____ You are invited to bid on the above specifications. The restrictions contained herein are for the purpose of fixing a quality level, and any deviation therefrom must, in detail establish that it meets the quality requirements.

BIDS WILL BE RECEIVED UNTIL 10:00 A.M. APRIL 24 _____ 2024.

ALL BIDS MUST BE SEALED, "BID NUMBER, COMPANIES NAME, AND NAME OF THE BID ITEM MARKED ON THE OUTSIDE OF THE ENVELOPE." THE BIDDER WILL RETURN THE ENTIRE BID PACKAGE. BIDS MUST BE DELIVERED TO THE RECEPTIONIST IN THE OFFICE OF THE COUNTY COMMISSION ADMINISTRATOR, 205 GOVERNMENT STREET ON THE EIGHTH FLOOR SOUTH TOWER OF THE MOBILE COUNTY GOVERNMENT PLAZA. FAILURE TO OBSERVE THE ABOVE INSTRUCTIONS WILL CONSTITUTE GROUNDS FOR REJECTION OF YOUR BID. THE COMMISSION RESERVES THE RIGHT TO REJECT ANY OR ALL BIDS.

MOBILE COUNTY COMMISSION



E. EDWIN KERR, INTERIM ADMINISTRATOR

We propose to meet the above specifications for the sum of

\$ _____.

Delivery can be made in _____ days from receipt of order.

RESPECTFULLY

BY _____



IMPORTANT

**THIS DOCUMENT MUST BE COMPLETED,
SIGNED AND RETURNED WITH YOUR BID**

As a condition for the award of a competitively bid contract to a company having one or more employees in the State of Alabama, the Beason-Hammon Alabama Taxpayer Citizenship and Protection Act, codified at Section 31-13-1, et seq., Code of Alabama (1975), as amended, requires that the company provide, in advance, proof of enrollment in E-Verify. E-Verify is an internet based system operated by the U.S. Department of Homeland Security, which may be used to determine the eligibility of new hires to work in the United States. Further information about enrollment in E-Verify may be found at www.uscis.gov/everify and www.Verify.Alabama.gov.

As proof of enrollment in E-Verify, Mobile County requires a copy of the electronically signed signature page of the contractor's Memorandum of Understanding with the U.S. Department of Homeland Security or Alabama Department of Homeland Security (contractors having fewer than 25 employees may enroll in E-Verify through the state Department of Homeland Security).

Please complete the following and return with your bid:

_____ (company name) has no employees in the
State of Alabama

Or

_____ (company name) is enrolled in E-Verify and a
copy of the electronically signed signature page of the company's Memorandum of Understanding is
attached.

Date

Signature

Title

E-Verify



Company ID Number: 477783

To be accepted as a participant in E-Verify, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 888-464-4218.

Employer Mobile County Commission

Connie Hudson

Name (Please Type or Print)

Title

Electronically Signed

12/21/2011

Signature

Date

Department of Homeland Security - Verification Division

USCIS Verification Division

Name (Please Type or Print)

Title

Electronically Signed

12/21/2011

Signature

Date

Information Required for the E-Verify Program

Information relating to your Company:

Company Name:	Mobile County Commission
Company Facility Address:	205 Government Street
	8th Floor South Tower
	Mobile, AL 36644
Company Alternate Address:	
County or Parish:	MOBILE
Employer Identification Number:	636001644

MOBILE COUNTY COMMISSION

BID FORM

Date: _____

BID #19-24.

FORTIS COMPREHENSIVE CONVERSION FOR MOBILE COUNTY COMMISSION:

Company: _____

Company Representative: _____
(Print)

Company Representative: _____
(Signature)

Address: _____

Phone number () _____

Fax number () _____

Federal ID Number _____

Email Address _____

Company Web Address _____

PLEASE INCLUDE A CURRENT W9

Fortis Comprehensive Conversion

Scope

Contractor will provide Professional Services to Extract, Transform, and Load (“ETL”) Customer’s Fortis (“Legacy System”) documents and metadata into the existing OnBase environment. Customer’s Legacy System is defined as follows:

1. Current System is Fortis
 - a. Scope includes conversion from one (1) instance of the Legacy System.
2. Up to four hundred thousand (400,000) documents are intended for conversion:
 - a. Pricing includes a ten percent (10%) growth allowance in document volume:
 - i. Document volume includes total document count, storage volume and/or document type count.
3. Current storage volume consumed by Legacy System documents intended for conversion is estimated at up to fifty (50) GB of storage space.
4. Legacy System leverages a SQL Server 2008 database running a Windows Server 2008 operating system; and
5. Documents are categorized within the Legacy System in up to sixty (60) document types.

As part of the Conversion Services, Contractor will perform the following or equivalent to:

1. Provide a Project Charter that outlines the scope, objectives, critical success factors, assumptions and constraints of the project;
2. Provide project management services to collaborate on the creation of a detailed project plan with the Customer in order to drive project schedule, milestones and coordinate transition to new environment;
3. Perform in-depth requirements analysis to determine document metadata mappings, infrastructure requirements, tactical planning and establish respective roles;
4. Deliver a Requirements Document (“RD”) based on the requirements analysis, which will outline the documents and document metadata to be migrated, the extraction formats related to mapping of converted content, and the conversion methodology;
5. Configure document type and keyword mappings between Software and the Legacy System according to the RD;
6. Configure conversion import processes based on document type and keyword mappings between Software and the Legacy System;
7. Convert a representative sample of the documents, with associated metadata, from the Legacy System to the Software for the purpose of validating and verifying the integrity of the conversion process “Sample Conversion”);
8. Perform Sample Conversion reiterations when any or all of the following conditions are met:

- a. In the event that Sample Conversion documents and/or associated metadata do not successfully import into Software as a result of a defect in the Contractor's conversion process, the Contractor will perform Sample Conversion reiterations until the defect is resolved;
 - b. In the event that the Sample Conversion documents and/or associated metadata do not meet the conversion requirements as documented within the mutually agreed upon RD, Contractor will perform Sample Conversion reiterations until the Sample Conversion documents and/or metadata are in alignment to the RD; and
 - c. In the event that Customer requests changes to the conversion requirements subsequent to the mutual agreement on the RD:
 - i. Contractor will perform up to two (2) Sample Conversion reiterations for requirement changes requested by Customer at no additional cost to Customer; and
 - ii. Any additional Customer request(s) for Sample Conversion reiterations beyond the two (2) provisioned allowances will require an additional fee of \$10,000.00 per reiteration, to be applied through an approved Change Order executed via [the standard Change Order process](#).
9. Ensure that the project plan accounts for the extraction of all Legacy System documents based on performance metrics gathered during the Sample Conversion;
10. Convert Legacy System files and metadata into the Software production system:
- a. Convert a single copy of the latest revision of each Legacy System document as part of the conversion process as discussed during discovery sessions and as documented in the RD; and
 - b. In the event that the Customer requests Contractor to import all historical revisions of each document, an additional fee of \$20,000 will be applied through an approved Change Order executed via the standard Change Order process.
11. Provide detailed Reconciliation Reports, accounting for one-hundred percent (100%) of Legacy System documents:
- a. Report will include the Legacy System document count, associated Software document count and any exception documents identified during processing; and
 - b. A Reconciliation Report will be delivered at the completion of the initial bulk load of Legacy System documents to Software ("Bulk Load")

Assumptions

This project is based on the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the proposed cost and timeline to deliver:

1. Legacy System does not use Centera for backup archive storage;
2. Contractor requires a read-only account to be able to connect to Legacy System database and/or storage location(s) in order to extract necessary data and files;
3. The linkage between the metadata in the Legacy System databases and the physical files representing the pages of each document are identifiable within each Legacy System database;

4. All physical files being migrated from the Legacy System to the Software are accessible on the Customer network by UNC path;
5. Legacy files will be migrated out of the legacy storage and into a new file storage location mutually agreed upon by the project team;
6. Depending on project specifics Contractor may utilize, at their sole discretion, a process where electronic files will be loaded via background process(es). The documents will be retrievable regardless of migration status, however, in the unlikely event that end users see a delay retrieving documents with unmigrated files, Customer acknowledges this is temporary until all files have been migrated by the background process(es);
7. Format of extracted Legacy System files will be natively supported by Software such that no file format alterations will be required:
 - a. The list of supported file types for conversion is provided in Appendix 4.
8. All physical files are not encrypted and are able to be extracted leveraging commercially available APIs or other tools:
 - a. If documents are unable to be extracted, a Change Order will be required to revise the scope to Transform and Load services only.
9. **Contractor will not be responsible for:**
 - a. Verifying the correctness or integrity of document metadata, or the quality of image files associated with the Legacy System; or
 - b. Enhancing or modifying such documents or document metadata, (e.g., rotating documents, enhancing image quality, or correcting metadata).
10. The production conversion will be performed in a single phase, as defined in the project plan, comprised of one (1) Bulk Load of static documents.
11. In the event the number of documents for conversion exceeds the estimation, including growth allowance, the Contractor will provide instructions to the Customer on how to complete the conversion with the remaining documents.

Exclusions

The following items are considered out of scope for this engagement:

1. The migration of any COLD/ERM reporting not available in an image format from Legacy System;
2. The migration of documents that have a PDF Portfolio file;
3. The migration of text-based notes from Legacy System;
4. The migration of graphical annotations (e.g. highlights, redactions, digital signatures) from Legacy System:
 - a. In the event Legacy System files have graphical annotations, Customer will be required to burn the graphical annotations into the physical file prior to data extraction for Contractor to be able to migrate the graphical annotations into the Software.
5. The migration of Legacy System audit history;
6. The migration of discrete data from the Legacy System;
 - a. Only the conversion of Legacy System documents that have a corresponding electronic file are included in the project scope.

7. The migration of document management, taxonomy, workflow, or other business process solutions from Legacy System;
8. The migration of workflow work in process (WIP) or in-flight activity, current status, data or history, except when extracted as document-level metadata;
9. Supplemental load(s) of documents; and
10. Image rotations applied to the document in the Legacy System will not be retained upon Conversion

Required Resources

Resource
Conversion Consultant
Project Manager

Document Deliverables

Document Deliverables
Project Charter
Remote Discovery Report
Discovery Activity Summary
Requirements Document
Traceability Matrix
Solution Design Document
Sample Conversion
Go-Live Checklist
Reconciliation Report
Conversion Project Closure Information
Conversion Activity Report

Key Assumptions

The following are key assumptions that impact the success of the solution, and are applicable to all Project Areas within this Services Proposal:

1. Project start date(s) are subject to a mutually agreed upon schedule after execution of contract;
2. Professional Services will be delivered utilizing Contractor's standard implementation methodology;

3. Professional Services will be provided both onsite at Customer location in Mobile, Alabama, as well as remotely from Contractor's offices:
 - a. While onsite, Contractor resource(s) will work during normal operating hours generally between 8:00 a.m. and 5:00 p.m., Monday through Friday, in Customer's local time zone; and
 - b. When providing remote services, Contractor and Customer will discuss generally acceptable working hours and take into consideration time zone differences. Issues deemed as non-critical will only be addressed during normal business hours.
4. Upon mutual agreement between Contractor and Customer, the Requirements Document (RD) replaces any previous form of scope or solution proposal and becomes the then current project scope. Any changes to the scope per the RD may require review and re-estimation of the work effort, timeline, and pricing to deliver, and, based on such review and re-estimation, Contractor will determine whether the Project Change Control Process is required;
5. Each project is intended to be implemented in a timeframe of contiguous weeks:
 - a. Scheduling delays that impact the project timeline will result in changes to project costs. If delays are introduced, a change order may be required and/or resources may be **reassigned**.
6. Each deliverable created will use Contractor's standard deliverable templates. Customer requested changes to deliverable templates may increase project costs or introduce timeline delays; and
7. If necessary, after execution, this Services Proposal or corresponding agreement can be adjusted in scope, or a new agreement issued, following the Project Change Control Process.

Customer Obligations

To facilitate Contractor's execution of the Professional Services, Customer agrees, at a minimum, to the following obligations. The parties acknowledge and agree that failure to meet the responsibilities noted will likely affect project duration, cost and/or quality in the execution and completion of Professional Services.

General

Project Personnel

1. Customer will assign a project sponsor, who will be actively involved in the project(s) and is the final escalation point for all issues and decisions:
 - a. The project sponsor will also ensure that the appropriate Customer personnel are assigned and made available to execute the project(s) successfully.

2. Customer will assign a project manager, who will act as a single point of contact for the Contractor project team and whose responsibilities include, but are not limited to, the following:
 - a. Managing all customer obligations as defined within this Services Proposal; and
 - b. Coordinating all key departmental decision makers, technical experts, subject matter experts, end user representatives, third-party software application resources and project sponsorship.
3. Customer will designate a Software administrator who will undergo any applicable Software training recommended in order to participate actively throughout the project(s) and support all Software environments and solutions:
 - a. Software training course(s) (if recommended) are provided separately from this Services Proposal by the Contractor.
4. Customer will engage the appropriate business process owners to the project(s), as well as subject matter experts, who are thoroughly knowledgeable about the current business practices in their respective areas and who are capable of performing their assigned project roles:
 - a. Business process owners and subject matter experts will be required to attend and contribute to all project meetings to which they have been invited for the duration of the project(s).
5. Customer will provide vendor resources, interface specialists, technical experts, and/or subject matter experts deemed necessary for third-party system(s) with which Software will integrate or from which content will be migrated;
6. Customer will make reasonable efforts to maintain consistent resources throughout the project(s):
 - a. Any anticipated changes to the core team must be communicated in writing within five (5) business days unless termination or illness is the result of the change.

Project Management

1. Customer will review all deliverables in accordance to the agreed upon plan. Failure to respond where needed within the designated timelines may result in project delays, loss of resources, and incorporation of the Project Change Control Process;
2. Customer will execute timely decision-making, completion of all deliverables and action items and resolution of issues throughout the course of the project(s); and
3. Customer will arrange for physical workspace and tools (work desks, networked computers, meeting rooms, training rooms, conference phones, whiteboards, etc.) for duration of the project(s) to accommodate scheduled onsite and/or remote activities as dictated by Customer's reasonable security measures.

Software Installation, Access, Integrations and Deployment

1. Customer will ensure all hardware is in place and made ready as dictated by the implementation schedule. This includes full, independent access to all environments in which Contractor is required to work including environments required for migrations or integrations:
 - a. Local and remote VPN access must be provided to applicable Contractor resources through the use of dedicated user account(s) with appropriate privileges to the Software and/or relevant third-party applications;
 - b. If direct independent access is not provided, it may result in additional project hours and/or increased project timeline; and
 - c. Access must be provided prior to Contractor's arrival at Customer facilities and/or project discovery sessions.
2. Customer will have at least one (1) non-production Software environment for installation and deployment;
3. Customer will provide all necessary components including, but not limited to, power, lighting, network connections/rights and environmental controls deemed necessary for the proper functioning of and access to the system;
4. Customer will manage third party application setup (i.e. installation, configuration), testing, **training, and go-live support related to integration(s) with Software;**
5. Customer will package and deploy all Software clients, unless otherwise defined within this Services Proposal; and
6. Customer will deploy all supporting Software client hardware (e.g. scanner, signature device) and related third-party software (e.g. drivers, licenses) required for the Software solution.

Testing

1. Customer will create, maintain, and execute test plans and cases, as well as track and report testing results during the testing cycle(s).

Conversion Specific

1. Provide Contractor with timely, uninterrupted remote access to Legacy System and conversion environment as documented in the conversion environment specification document. Access will be granted for the duration of the project and prior to Contractor staffing project resources. Assigned Conversion resources must have uninterrupted remote access. Please note that some resources assigned to perform the Services may be located in other countries:
 - a. Access includes read and copy rights to the Legacy System database and file storage; and
 - b. If access is unable to be granted, a Change Order will be opened to modify the service level to Transform and Load only, and the Customer will be responsible for extraction of data.
2. Make available Customer personnel to assist with local workstation support if needed;

3. Assist in deployment and configuration of a conversion hardware environment to include temporary storage space and processing machines used to execute conversion processes:
 - a. Customer will assist in deployment to data center and configuration of remote access to Contractor with requested permissions; and
 - b. Contractor requirements for conversion hardware environment will be provided.
4. Configuration and deployment of required document types and keywords will be completed by Customer to align with the project plan required for availability in order to complete testing and import into production if there is not a corresponding software deployment;
5. Sign-off on the Project Charter that outlines the scope, objectives, critical success factors, assumptions and constraints of the project;
6. Provide Contractor with a baseline inventory of the documents to be converted or provide sign-off on an inventory generated by Contractor;
7. Identify document type and keyword mappings between the Legacy System and the Software;
8. Identify a representative subset of documents to be converted for the purposes of the sample conversion from each of the Legacy System application(s);
9. Create test cases and scripts as needed to support Customer review and approval of the sample conversion;
10. Validate the sample conversion provided and notify Contractor within the time period set out within the project plan of any nonconformity as set forth in the Requirements Document. Contractor will correct its conversion utility to account for any systemic failures noted by the Customer. Customer notification to Contractor regarding suspected systemic failures shall be by electronic mail;
11. Provide written verification of testing completion and solution acceptance within the time period defined in the mutually agreed upon project plan to initiate the production conversion;
12. Identify the most critical documents that are preferred to be available in OnBase at Go-Live:
 - a. Contractor will make all reasonable attempts to prioritize these documents for ingestion into OnBase production first. Priority criteria can be associated with Legacy Document Date, Legacy Document Type or similar keyword logic;
 - b. Variables such as project duration, total volume of documents eligible for conversion, viability of the OnBase production system, ancillary data point availability (i.e., data from an external source), timing of Conversion testing sign off, and import throughput all impact the amount of documents able to be imported into production prior to Go-Live and until Conversion completion:
 - i. Contractor will provide a throughput assessment after day five (5) of successfully importing documents into OnBase production to determine estimated time to completion.
 - c. Contractor will make all reasonable attempts to load as many documents into the production environment as possible to align with the Go-Live. Contingency planning and document retrieval strategies for documents not yet imported into OnBase at the time of Go-Live will be coordinated by the Customer.
13. Identify cutoff dates for the initial production conversion of static documents in Legacy System applications;
14. Identify date and import priority criteria for the supplemental conversion(s) (if included in scope) of newly added and/or active documents for Legacy System applications:

- a. In the event that not all documents designated for the bulk load are completed at the time of the supplemental conversion, Contractor will pause that process and prioritize the documents identified as required for the supplemental load(s).
15. Review and validate the reconciliation report provided. Notify Contractor within ten (10) business days of receipt of any required corrective actions for resolution of exceptions. Customer notification to Contractor regarding exception resolution shall be by electronic mail;
16. Report any errors during the warranty period as defined in the MSA:
 - a. An error is defined as a defect in conversion logic that causes converted documents not to meet documented requirements;
 - b. New or changed requirements after the conversion is complete will be scoped as a new services engagement; and
 - c. After the warranty period, any errors, new requirements, or changed requirements will be scoped as a new services engagement.
17. In the event the Legacy System remains active after the data conversion project, perform any legacy data clean-up remaining in the Legacy System.