

**BALTIMORE COUNTY, MARYLAND  
PURCHASING DIVISION  
400 WASHINGTON AVENUE, ROOM 148  
TOWSON, MARYLAND 21204-4665**



**REQUEST FOR INFORMATION NO. I-10000324**

**SHERIFF CASE MANAGEMENT SOFTWARE**

**Due Date: 12/06/24 Time: 3:00 PM**

**EMAIL INFORMATION TO: [bid@baltimorecountymd.gov](mailto:bid@baltimorecountymd.gov)**

**Jason Hartline, Senior Buyer  
PHONE: 410-887-2495**

**Amendments often occur prior to the opening and sometimes within as little as 48 hours prior to due date. It is the potential Solution Provider's responsibility to frequently visit the Purchasing web site (<https://www.baltimorecountymd.gov/departments/budfin/purchasing/>) to obtain amendments once they have downloaded this Request for Information.**

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**1. STATEMENT OF PURPOSE.**

- 1.1 The purpose of this Request for Information (RFI) is to obtain information from the vendor community on the availability, capability, and functionality of Sheriff Case Management solutions currently offered in the marketplace. At this time, Baltimore County Government (BCG) uses a manual process to track and manage their cases.

The desired outcome of this RFI is to build requirements for a comprehensive system for the Sheriff's office that can create, track and manage cases efficiently. It's crucial to prioritize data security and compliance with relevant laws and regulations, especially when handling sensitive law enforcement data. Additionally, ongoing support, training, and maintenance should be considered as part of the solution implementation plan

The County will consider the information received as a result of this RFI to assist in refinement of functional and technical system requirements. The County is seeking as much information as possible through this RFI process.

- 1.2 The specific objectives that the County intends to accomplish through this RFI are as follows:
- 1.2.1 Identify Solution Providers who offer Sheriff Case Management System.
  - 1.2.2 Identify Solution Providers who have experience deploying of Sheriff Case Management System for County/State government.
  - 1.2.3 Identify Solution Providers who have specific knowledge of state-level business rules and statutory requirements that govern the Sheriff Case Management System.
  - 1.2.4 Identify software architectures and service arrangements that will allow the solution modules and business rules to be adjusted as required by state-level statutory changes and county-level policy changes.
  - 1.2.5 Identify what standard integration architectures are supported by Solution Provider's modules.
  - 1.2.6 Determine the ability and ease to create interfaces from the Sheriff Case Management System systems to other applications used by the County.
  - 1.2.7 Identify other government entities which have recently implemented similar systems and learn from their experiences.
  - 1.2.8 Identify Solution Providers who offers technical support by either phone, email, online chat, etc. Also identify a vendor who provides technical support 24 hour per day or at least on weekdays during Baltimore County Government's core business hours.

1.2.9 Identify Solution Providers who offer a Sheriff Case Management System solution with (but not limited to) the following capabilities:

1.2.9.1	<p><b>Case management</b></p> <ul style="list-style-type: none"> <li>• Ability that allows Deputies to create, track and manage cases efficiently.</li> <li>• Ability to store case-related information, documents, and evidence securely.</li> </ul>
1.2.9.2	<p><b>Incident Management:</b></p> <ul style="list-style-type: none"> <li>• Ability to track incidents to record and manage details of incidents reported to the Sheriff's Office.</li> </ul>
1.2.9.3	<p><b>Judicial Sales:</b></p> <ul style="list-style-type: none"> <li>• Ability to track judicial sales that manages the process of selling assets or property seized as part of legal proceedings.</li> <li>• Ability to track/record sale details, track bids, and manage the financial aspects.</li> </ul>
1.2.9.4	<p><b>Process Tracking (Legal Papers):</b></p> <ul style="list-style-type: none"> <li>• Ability to track the service of legal documents, such as summonses and subpoenas.</li> <li>• Ability to assign and tracking of service tasks, along with time stamps and delivery confirmations.</li> </ul>
1.2.9.5	<p><b>Warrant Tracking:</b></p> <ul style="list-style-type: none"> <li>• Ability to track active warrants, including details about the warrant, individuals involved, and warrant status.</li> </ul>
1.2.9.6	<p><b>Public Portal:</b></p> <ul style="list-style-type: none"> <li>• Ability to have a user-friendly public portal that allows electronic filing of documents.</li> <li>• Enable the public to view the status of their cases, warrants, or legal documents online.</li> </ul>
1.2.9.7	<p><b>Dynamic Document Management</b></p> <ul style="list-style-type: none"> <li>• Ability to dynamically manage and update documents based on new instances, rather than creating separate records for each instance and ensure that data is associated with individual cases, not just specific documents.</li> </ul>
1.2.9.8	<p><b>Integration with External Systems:</b></p> <ul style="list-style-type: none"> <li>• Ability to Integrate with external systems, such as the court system and warrant databases, to provide real-time data on individuals and addresses.</li> <li>• Cross-reference information to identify individuals with warrants or other relevant records.</li> </ul>
1.2.9.9	<p><b>Efficiency and Safety:</b></p> <ul style="list-style-type: none"> <li>• Ability to provide real-time information about the properties they are visiting and individuals they are serving.</li> </ul>
1.2.9.10	<p><b>Auto-Fill and Data Matching:</b></p> <ul style="list-style-type: none"> <li>• Ability to provide auto-fill features with previously entered data for fields like names and addresses to save time and reduce errors.</li> </ul>
1.2.9.11	<p><b>Assignment Management:</b></p> <ul style="list-style-type: none"> <li>• Ability to allow for the assignment of Deputies to specific courtrooms or tasks.</li> <li>• Ability to assign multiple Deputies to a single courtroom if needed.</li> </ul>

1.2.9.12	<b>Resource Tracking:</b> <ul style="list-style-type: none"> <li>Ability to track resources such as vehicles, equipment, and personnel availability to ensure they are allocated efficiently</li> </ul>
1.2.9.13	<b>Reporting and Analytics:</b> <ul style="list-style-type: none"> <li>Ability to allow supervisors to generate reports on assignment history, deputy workload, and courtroom utilization.</li> <li>Provide analytics to identify trends and optimize resource allocation.</li> </ul>
1.2.9.14	<b>Automated Alerts:</b> <ul style="list-style-type: none"> <li>Ability to alert supervisors and Deputies automatically when they are assigned to a courtroom or when assignments change.</li> </ul>
1.2.9.15	<b>Historical Data Storage:</b> <ul style="list-style-type: none"> <li>Ability to store historical data on past assignments and courtroom activities for reference and analysis.</li> </ul>
1.2.9.16	<b>Bar Code Scanning:</b> <ul style="list-style-type: none"> <li>Ability for Deputies to barcode scan summons while out on the road, which provides a real time "location" update.</li> </ul>

1.3 This RFI is issued solely for information and planning purposes – it does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future. Solution Providers are advised the County will not pay for any information or administrative costs incurred in response to this RFI. All costs associated with responding to this RFI will be solely at the Solution Provider’s expense. Not responding to this RFI does not preclude participation in any future RFP, if issued.

1.4 Baltimore County Government appreciates your input in this process.

**2. BACKGROUND.**

Baltimore County Government’s (BCG) Sheriffs’ Department manages cases, incidents, judicial sales, legal papers, tracks warrant manually. Additionally, there is a growing demand for transparency and accessibility, prompting the requirement for a public portal to facilitate electronic document filing and data access for the public. This RFI outlines the essential features and functionalities of a comprehensive computer solution that will address the Sheriff’s Office’s pressing needs and improve its capabilities significantly.

The Sheriff’s Office currently faces several challenges that hinder its ability to carry out its duties effectively:

- 2.1. Inefficient Case and Incident Management: Manual record-keeping and data management processes lead to errors, delays, and difficulties in tracking case details, service notes, and historical data.
- 2.2. Lack of Transparency: The absence of a public portal limits public access to case information and important updates, causing frustration and hindering transparency.
- 2.3. Fee Tracking: The existing system lacks the capability to accurately track fees collected and refunds issued, leading to financial discrepancies.
- 2.4. Reporting and Analytics: The Sheriff’s Office struggles to generate meaningful reports and statistics for internal, county, and public use.

- 2.5. Geographical Data Queries: The inability to perform data queries based on geographical areas, demographics, and external agencies' requirements results in a lack of effective data sharing and collaboration.
- 2.6. Safety Alerts: Manual monitoring of locations and individuals being served poses risks, and automated safety alerts are needed to enhance officer safety.

**3. VENDOR SOLUTIONS.**

- 3.1 The County is open to any and all solutions from the vendor community. The County is seeking Solution Providers that can meet the BCG's needs., including the following attributes:
  - 3.1.1 Solution Provider shall be regularly and continuously engaged in the business of developing and delivering **Sheriff Case Management system** programs for at least five (5) years. Please include in your Response a customer testimonial, performance narrative from past project, published research or a combination of these to demonstrate this qualification.
  - 3.1.2 Solution Provider has demonstrated required knowledge of building integration with various systems using industry standard data interchange formats / protocols.
  - 3.1.3 Solution Provider has demonstrated experience within the past five (5) years of successfully scaling up a major project within a short time frame, with the administrative capacity and staff to rapidly train and support diverse users and stakeholder organizations in a feasible, scalable manner.
  - 3.1.4 The product must comply with the County's Information Technology Technical Standards which are available at:  
<https://resources.baltimorecountymd.gov/Documents/IT/technicalstandards.pdf>
  - 3.1.5 Provides for data and access security that meets the County's standards which are based on NIST 800-53 for privacy and security.
  - 3.1.6 Is fully compliant with the requirements of any federal, state and county legislation. NOTE: Proposed solutions supporting government mandated programs should be modifiable in a timely manner to accommodate frequent time sensitive legislative changes in Maryland thereby allowing users to remain legislatively compliant.
  - 3.1.7 The implementation of a solution must allow for interface or integration with existing County architecture. BCG utilizes the following software:

Vendor/Product	Purpose	Integrate/Replace
Meters/ NCIC	State and national criminal records system	Integrate
The district court system	To access information related to the case.	Integrate
Warrants and Summons Inventory system	If we do not get a comprehensive system to include the warrants and summons tracking	Integrate

- 3.1.5 The County requires a solution to provide functionality for the following areas:
- 3.1.5.1 Sheriffs' Case Management system
- Case Management
  - Incident Management
  - Judicial Sales
  - Process Tracking
  - Warrant Tracking
  - Fee Management
  - Public Portal
  - Reporting and Analytics
  - Geographical Data Queries
  - Barcode Scanning
  - Automated Safety Alerts
- 3.1.6 The staff of the Sheriffs' Office manage their cases, incidents, judicial sales, legal papers using Microsoft Excel spread sheets. This data is closely tracked, analyzed and sent to [BCSTAT](#). Warrants, summons and refunds fees is tracked in the Warrants and Summons Apex application currently.
- 3.1.7 The Sheriff's Office staff currently input the civil process, or a summons manually into the Warrants and Summons Apex application.
- 3.1.8 The Sheriff's Office faces a significant challenge where Deputies must rely on their own memory to determine whether they have previously served a particular resident. This reliance on memory introduces the potential for errors, inefficiencies, and incomplete information.
- 3.1.9 The Sheriff's Office is currently facing a critical challenge in managing individual documents related to cases. While documents are received and processed efficiently, there is no system in place to update or reference these documents in the context of the overall case. This results in a lack of continuity and potentially leads to confusion when dealing with the same individual under the same case number.
- 3.1.10 The Sheriff's Office cannot cross reference any warrant related system to get real time updates to flag individuals and addresses.
- 3.1.11 The Sheriff's Office is in need of a public portal to view case information by the public. This portal can be used by the lawyers to upload any documents related to sheriff sales.
- 3.1.12 The proposed case management solution must meet the Sheriff's Office needs. It must provide an integrated view of core business processes using common and/or distributed databases maintained by a database management system.
- 3.1.13 The implementation of the proposed Sheriffs' Case Management solution must align with the goals and strategic initiatives of the County and its commitment to fiscal stewardship. Specifically, the proposed solution must contribute to effective two-way communication for internal and external stakeholders; build, sustain, and invest in technology infrastructure and efforts to streamline data management and create efficiencies throughout the organization; and develop and implement a system-wide framework to ensure efficiencies for the Sheriff's Office.

#### 4. **INSTRUCTIONS FOR RESPONDING.**

- 4.1 Solution Providers responding to this RFI are required to submit their information by December 6, 2024 at 3:00 PM to **bid@baltimorecountymd.gov**. Late responses will not be considered.
- 4.2 Solution providers are advised that the County cannot receive email attachments greater in size than twenty-five (25) megabytes and this size limitation may be further reduced by requirements of the Solution Providers' email provider which are beyond the control of the County. Solution Provider should consider separating any large attachment into multiple parts and emailing each part separately. In such case, Solution Provider will note that each email is *1 of 2, 2 of 2*, etc.
- 4.3 As with any system, power outages or technology problems may arise that are outside of the County's control and could affect your submission. The County will not be held accountable for such issues that may delay the transmission of any Solution.
- 4.4 To support the review activities, the County is requiring a consistent format for all responses. As such, the following Questionnaire should be used when responding to this RFI. The Questionnaire includes items regarding solution provider information, software functionality, technology information, and general questions. Additional information such as marketing brochures, product fact sheets, technical documentation, etc. may also be provided.
- 4.8 Solution Provider will possess all permits, licenses and professional credentials necessary to supply product and perform services as specified under this RFI.

#### 5. **INQUIRIES.**

- 5.1 All correspondence / questions related to this RFI must be directed to the Buyer, Jason Hartline via email [jhartline@baltimorecountymd.gov](mailto:jhartline@baltimorecountymd.gov).
- 5.2 Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to this RFI will be provided by written addendum and posted on <http://www.baltimorecountymd.gov/Agencies/budfin/purchasing/currentsolicitations.html>.
- 5.3 The deadline for written questions are 7 working days prior to the due date.

#### 6. **QUESTIONNAIRE.**

Responses to this RFI should address each item within this questionnaire. Please respond to each question as completely and succinctly as possible.

##### A. **VENDOR INFORMATION: This information MUST be the first page of your submittal.**

- 1. Company Name
- 2. Parent Company
- 3. Mailing Address
- 4. Contact Name, Telephone, and Email Address
- 5. Year founded



6. Company Website URL
7. Main products/services provided
8. Software name (market name)
9. Number of years on the market
10. Number of citizens by type (i.e. county, municipality, etc.) using any of your proposed solutions (number of citizens by module)

**NOTE: All answers should be preceded by the corresponding question.**

**B. GENERAL INFORMATION**

1. Product Names and Descriptions – Please describe your solution, and clearly identify the individual software modules, add-ons e.g. utilities/tools/report generators, underlying technology, and third-party applications that you would recommend that meet the County’s requirements.
2. What is the proposed version of the solution? How long has the proposed version of the solution been available for client use? How long do you expect this version to be a viable release? When was the last time that the user interface updated/refreshed?
3. Describe the history of the primary product(s) being proposed including whether these product(s) were internally developed, acquired in-whole or in part, or something different.
4. Please provide the upgrade or release plans for the next three years. Include in your response the extent to which the proposed product(s) are to be replaced or substantially modified. How often are major upgrades for the proposed solution released? Minor upgrades?
5. Describe what methods your company uses to keep pace with changes in your target industry.
6. How many clients and sites are currently using the proposed version as their production system? Provide a list of state and county agencies in which your products are in use. What is the largest organization you support? Please describe this organization and the setup/use of your system in this environment.

**C. BUSINESS SPECIFIC INFORMATION**

**Case Management**

1. Describe how the proposed solution would create track and manage cases efficiently.
2. Describe how the proposed solution would store case-related information, documents, and evidences securely.
3. Describe how the proposed solution allows the business user to capture case details and capture its progress status.

4. Provide screenshots of the case management module.
5. Describe how the proposed solution allows the business user to relate tickets logged back to a constituent or a group of constituents.
6. Describe how the proposed solution allows business users to refer a case. Also describe how the proposed solution allows business users to track a case.
7. Describe how the proposed solution allows business users to assign and reassign a case to another deputy.
8. Does the Deputy receive notification when they are assigned to a case? Describe how the proposed solution sends notifications to the Deputy who has been assigned to a case.
9. Describe how the proposed solution allows business users to search for and filter open cases.
10. Describe how the proposed solution allow business users to collaborate on logged tickets or keep private.
11. Does proposed solution allow business users to add custom fields for tickets? If so, please describe.

#### **Incident Management: Contacts Management**

12. Provide representative screenshots of the Incident Management user interface.
13. Provide a list of Incident Management features and detailed description of the capabilities for how this proposed solution captures and manages incidents reported to the Sheriff's Office
14. Describe how the proposed solution allows business users to categorize incidents by jurisdiction.
15. Describe how the proposed solution allows business users to relate and track current, past, and future activities to the incident.
16. Describe how the proposed solution allows the business user to search for and filter incidents
17. Does proposed solution allow business users to add custom fields for incidents? If so, please describe.

#### **Judicial Sales:**

18. Provide a list of Judicial sales features and detailed description of the capabilities for how this proposed solution captures selling assets or property seized as part of legal proceedings.
19. Describe how the proposed solution allows business users to record sale details, track bids, and manage the financial aspects.
20. Describe how the proposed solution allows business users to categorize the sales by location.

**Process Tracking (Legal Papers):**

21. Describe how the proposed solution allows the business user to track the service of legal documents, such as summonses and subpoenas.
22. Describe how the proposed solution allows the business user to assign and track, service tasks, along with time stamps and delivery confirmations

**Warrant Tracking:**

23. Describe how the proposed solution allows the business user to add, update and search for warrants.
24. Provide representative screenshots of the warrants user interface.
25. Describe how the proposed solution allows the business user to track active warrants.
26. Describe how the proposed solution allows the business user to include details about the warrant.
27. Describe how the proposed solution allows the business user can include details about the individuals involved.
28. Describe how the proposed solution allows business user can track the status of the warrant.

**Public Portal:**

29. Describe how the proposed solution will have the user-friendly public portal that allows electronic filing of documents.
30. Describe how the proposed solution will enable the public to view the status of their cases, warrants, or legal documents online.

**Real Time Updates:**

31. Provide a list of Real time updates features and capabilities, along with detailed descriptions of each.
32. Describe how the proposed solution provides the ability to dynamically manage and update documents based on new instances, rather than creating separate records for each instance.
33. Describe how the proposed solution provides the ability to ensure that data is associated with individual cases, not just specific documents.
34. Describe how the proposed solution has the ability to provide real-time information about the properties the Deputies are visiting and individuals they are serving.

**Integration with External Systems:**

35. Describe how the proposed solution provides the ability to integrate with external systems, such as the court system and warrant databases, to provide real-time data on individuals and addresses.

35. Describe how the proposed solution provides the ability to cross-reference information to identify individuals with warrants or other relevant records.

**Reporting and Analytics:**

37. Provide a list of reporting features and capabilities the proposed solution offers, along with detailed descriptions of each.
38. Provide a list of out of the box standard reports that are delivered with the proposed solution and if the out of the box standard reports are customizable by the business user without vendor assistance.
39. Describe how the proposed solution generates out of the box standard and custom reports.
40. Describe how the proposed solution handles a secure export and download of reports and the file export formats used.

**Assignment Management:**

41. Describe how the proposed solution provides the ability to assign Deputies to specific courtrooms or tasks.
42. Describe how the proposed solution provides the ability to assign multiple Deputies to specific courtrooms or tasks.
43. Describe how the proposed solution provides the ability to alert the users automatically when they are assigned to a specific location.

**Bar Code Scanning:**

44. Describe how the proposed solution provides the ability for the business user to barcode scan summons while out on the road, and provide real time location update.

**D. TECHNICAL INFORMATION**

**\*Please mark any questions that are not applicable to your solution as “not applicable”.**

**Software/Licensing**

1. Provide the current hardware/software environment for the solution, including operating system, database, etc.
2. Describe what versions and internet browsers the system supports. Include which mobile devices the system supports. Describe your approach for keeping up with the latest browsers and mobile devices.
3. What is the solution’s conformance to ADA standards related to web interfaces?
4. Identify out-of-the-box tools provided to build interfaces with other business systems. Include in your response required and/or recommended third party integration tools.

5. The County intends that the solution will be installed on multiple environments (such as test, development, training, production, and any others.) Identify any concerns of Offeror regarding this. Describe whether there is an additional licensing cost to provision and maintain multiple non-production environments.
6. Identify and describe any concerns with copying the proposed solution from one environment to another (such as copying from production to development, test, training, etc.) in a virtualized environment or any other environment).
7. Describe your company's testing and quality control process.
8. Describe the processes used to export, import, and upload data. Include in your response the formats that can be imported/exported, and a description of how vendor interfaces are developed and maintained.
9. Describe how data is shared across modules. Include in your response how data produced from the proposed solution is fully integrated throughout all major areas of the solution. In your response indicate what type of data is available real-time versus copied through interfaces or batch processes.
10. Does the proposed solution maintain a full history of interactions/transactions including the ability to enter ad-hoc notes and recording the results of interactions?
11. If a data warehouse is used for reporting, describe the process and frequency by which the data is refreshed. What type of system assurance reports are available to compare the source and target databases?

### **Third-Party Integrations**

12. Provide a list and description of third-party applications and platforms the proposed solution is compatible with for integration.

### **Data Migration**

13. Describe how the proposed solution supports the migration of data currently captured and managed in a different source repository.

### **Reporting**

14. Does the proposed solution support real-time reporting? If so, what impact, if any, does it have on system performance?
15. Describe reporting functionality available for querying system access, metrics, or performance.
16. Describe how the proposed solution supports generating reports based on weekly, monthly and daily data during a specified date range. This includes detailed reports of all activity by user on a given day by a transaction type and or entity. The proposed solution must also support the ability to perform complex calculations and logic inside of reports.

## Security

17. Describe application security (including but not limited to role, user, screen, module, table, column, update, view-only, field.). If the proposed solution supports role-based privileges, describe how roles are maintained and administered by designated security administrators.
18. Describe any automatic functions, such as inactivity log-off, used in the solution.
19. Explain how the system can allow password reset by selected users without giving access to administrator functions.
20. Does the proposed solution support "single sign-on" through Microsoft Active Directory's LDAP implementation? Explain the authentication method employed and ability to integrate with AD or LDAP.
21. Identify any sensitive data that the solution uses for identification and whether or not this data is encrypted at rest and in transit.
22. Describe policies with regard to criminal background checks for staff assigned to work on any portion of the contract, including third party vendors.
23. Do you have a formal incident response plan? If yes, please describe your plan and attach documentation where possible.
24. Are passwords hashed and salted (SHA-1, SHA-256, MD-5, etc.) so that they cannot be decrypted? Please describe.
25. What protections do you have in place for ensuring only authorized employees have access to County data?
26. Does your company own the physical data center where the County's data will reside? If yes, describe how your facility is physically secure. If no, who owns the data center and what security is in place?
27. If you are using a co-located data center, will any of the County's data ever leave the continental United States? If so, please list all countries where it will be stored.
28. Are intrusion detection and technologies and firewalls utilized on the hosted systems? Please describe.
29. Will County data be shared with or hosted by any third parties? If yes, please list all third parties, whether or not you perform security assessments of them, and how often they are reassessed.
30. Have you experienced a security breach? Please provide the detailed procedure to be followed in the event of a data breach with respect to those whose data was breached, including:
  - 30.1 Requirement to notify
  - 30.2 Notification timeframe
  - 30.3 Provision of pertinent breach details
  - 30.4 Circumstances surrounding the breach

30.5 Corrective actions

30.6 Prevention plans

31. Are your systems AND applications scanned for vulnerabilities by a qualified third party? If yes, what scanning companies do you use? How often do you perform a scan? Are your applications scanned prior to a new release?
32. Do you have a disaster recovery plan? If yes, when was the last time you tested your DR plan? How often do you test the plan (schedule)?
33. Describe any policy in place which mandates employees notify them of any criminal charges or offenses.

### **Hardware, Network, and Database**

34. Provide the minimum and recommended requirements for any required application server(s) for the proposed solution. Specify Windows OS/NOS, service levels/packs required (Windows 2012 minimum), additional software, additional hardware, 32/64 bit, etc.
35. Identify the browsers (including versions and service packs) with which the proposed solution has been tested.
36. Provide the minimum and recommended requirements for the database server for the proposed solution. Specify OS/NOS, service levels/packs required, and any additional software and hardware.
37. Define the environment on which the proposed solution runs (two-tier client server, three or n-tier client server, Web browser-based environment, etc.)
38. Does the solution work through proxy servers? Indicate the type of proxy servers that have been tested with the proposed solution.

### **Project Methodologies and Management**

39. Describe in detail your company's methodologies with regard to the following:
  - 39.1 Application development
  - 39.2 Quality control – including types of tests, test plans, assurances that patches are correct, whether unit tests are included within the code, etc.
  - 39.3 Configuration management – including customization management
  - 39.4 Version control
40. Describe in detail your company's methodologies with regard to the following:
  - 40.1 Solution upgrades
  - 40.2 Customizations – whether they become part of the base solution, if they are available to all clients paying for support

41. Describe in detail your company's methodologies with regard to the following:
  - 41.1 Project management best practices in the performance of all obligations and responsibilities, particularly those prescribed by the Project Management Institute and documented in the Project Management Book of Knowledge, 3rd edition or later.
  - 41.2 Project management methodology. provide a detailed overview of the methods for managing communications, scope, cost, time, project and product quality, change, risk, schedule, resource, education, plan acceptance, subcontractors and the overall customer relationship.
  - 41.3 Project lifecycle (PMLC) and software development lifecycle (SDLC) methodologies, including planning, requirements, design, development/construct, test, training, implementation and evaluation. Identify the development framework to include Waterfall, Agile or Hybrid.
  - 41.4 Project management approach and describe its PMLC and SDLC for the implementation of the system, including the timing of deliveries, training, data conversion and expected effort from County. Include tasks to be performed by County.
  - 41.5 Project schedule showing a typical implementation for the system including significant tasks with milestones and critical path.
  - 41.6 Proposed project status meetings. Describe delivery of weekly meetings, agendas and meeting minutes.
  - 41.7 Escalation process. Describe steps to include task to be performed by County.

#### **Software Business Solutions**

42. Describe options for Software as a Service (SaaS) or hosted option. Include in your response the number of clients using this option and server locations.
43. Describe your communication plan for planned and unplanned downtime.
44. Provide a description of Support Agreements (including severity levels and response times).
45. Describe your project, implementation, testing, and change management approach. Include in your response whether you use a standardized implementation model.
46. Describe your approach and facilities for customer service. What are the locations of your call centers?
47. Describe the new release / future release process.
48. Describe your issue resolution processes and how you track support. What tracking systems do you use?
49. Describe the process used to deliver and install software patches for system defects, including the level of automation of regression testing tools used in



releases, emergency fixes, solution impact notification and version control process, etc.

- 50. Describe the process used to deliver and install software changes needed for regulatory compliance.
- 51. Describe any national and or regional user groups available to County staff.
- 52. The County requires that vendors place application software source code in escrow. Please indicate whether you currently have a master escrow agreement in place and if so, the name of the company and the cost per year.

**Training**

- 53. Describe all training activities that will be provided to the County. Include what training comes as part of your services and methodology? What type of training do you offer for configuration and customization of software and APIs? Describe system administration training. Describe who does your training. Include any hardware or software used.
- 54. Describe any end user training or focus group services provided. Offeror to include information on access to training systems/instances and relevant data and technology as applicable.

**Technical Support**

- 55. Describe in detail all levels of technical support that will be provided to the County. Include support hours provide, all contact methods, expected response time, expected resolution time, etc.

**E. OTHER INFORMATION.** - Please provide any additional information that you feel would be beneficial to the County in researching possibilities when considering solutions.

Please submit this completed Questionnaire with any addition information you choose to share by the closing date and time to [bid@baltimorecountymd.gov](mailto:bid@baltimorecountymd.gov). Late responses will not be considered. **Thank you!**

COMPANY NAME: \_\_\_\_\_ DATE \_\_\_\_\_

CONTACT: \_\_\_\_\_

PRINT NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_