

Response to Request for Proposal No. 859 Integrated Land Records and Vital Statistics Recording System



March 10, 2022

Info Quick Solutions, Inc.

7460 Morgan Rd. Liverpool, NY 13090
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7460 Morgan Road Liverpool, NY 13090 briano@iqsworks.com • (800) 320-2617

March 10, 2022

Lyda Ruijter, Town and City Clerk 888 Washington Boulevard, Ground Floor Stamford, CT 06901

Dear Ms. Ruijter:

IQS is pleased to respond to the City of Stamford's request for proposals for an integrated land records and vital statistics recording system. IQS has experienced tremendous growth built upon our ability to combine technical knowledge with a thorough understanding of the Town Clerk's office functions as well as the Town Clerk's relationships among other departments, to develop creative, customized, and user-friendly solutions.

IQS proposes a solution that employs current technologies to fee, index and image land, map, vitals, trade names, licenses, military discharge, and dog records.

We have developed a plan for the Town Clerk's Office to seamlessly transition to our records management system—including data conversion, implementation, training, and ongoing support.

As the Vice President of Sales, I am authorized to contractually obligate IQS and may be contacted by the following:

Address: 7460 Morgan Road **Phone:** (800) 320-2617

Liverpool, NY 13090 **Email:** <u>briano@igsworks.com</u>

Tax ID: 16-1573412

IQS is excited by the opportunity to work with Stamford to implement a system that can expand well into the future. We agree with the scope of services and requirements set forth in this RFP with no exceptions. Please feel free to reach out to me if you have any questions.

Sincerely,

Brian J. Owens

Vice President of Sales



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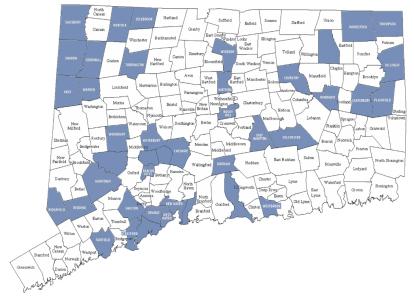


I. Executive Summary

Info Quick Solutions, Inc. (IQS) is pleased to submit this proposal for the Stamford Town Clerk's land records and vital statistics recording system.

It has been a privilege to serve many City and Town Clerks in Connecticut over the past decade. IQS has established a track record of excellent service, quality products, and innovation. We have delivered many software updates and enhancements consistent with our commitment to continuous improvement.

Our software suite, Solution, integrates all office functions into a user-friendly and



easily-adaptable interface. Upon review of this proposal you will learn why Solution powers 38 cities and towns in Connecticut, with four more under contract.

In addition to our best-in-class software suite, we deliver world-class support. This proposal includes unlimited on- and off-site support. Calls to our office are answered by live people and routed to the appropriate support person, who is empowered to solve any problems that may arise.

Stamford will receive expert consultation throughout the contract. As a full-service company, IQS has the resources and knowledge to develop creative solutions.

A. Corporate Profile

IQS is a privately-held, veteran-owned, debt-free New York State corporation specializing in records management services. Our founder, Bernie Owens, has decades of experience in the field and has spearheaded numerous industry innovations.

Our Liverpool, NY facility includes a state-of-the-art microfilming and imaging lab, indexing department, support center, programming staff, and data center. We employ approximately 50 people, representing many collective years of experience. We pride ourselves on high staff retention, which correlates to our excellent customer service and ability to innovate.



B. Statement of Qualifications

As an industry leader in land records management, IQS has deep knowledge and expertise in the business operations of the Town Clerk's office. We provide a wide range of solutions to municipalities of all sizes in Connecticut, New York, Pennsylvania, Maine, Rhode Island, and New Jersey. IQS has implemented more than 85 installations.

Our philosophy is that software is never done. Our software suite is constantly being improved upon to accommodate feedback from our customers and integrate industry changes.

The City of Stamford will receive expert consultation from IQS. As a full-service company, IQS has the resources and knowledge to develop creative solutions. We are excited by the opportunity to provide a system that can expand well into the future.

Response to RFP No. 859 — Stamford, CT $\,$

II. References

IQS provides records management services for 38 cities and towns in Connecticut.

MUNICIPALITY	CONTACT
Ashford, CT	Sherri Mutch, Town Clerk (860) 487-4401 smutch@ashfordtownhall.org
Beacon Falls, CT	Len Greene Sr., Town Clerk (203) 729-8254 <u>Igreene@townofbeaconfalls.com</u>
Canterbury, CT	Natalie Ellston, Town Clerk (860) 546-9377 nellston@canterburyct.org
Cheshire, CT	Laura Brennan, Town Clerk (203) 271-6601 lbrennan@cheshirect.org
Colchester, CT	Gayle Furman, Town Clerk (860) 537-7217 townclerk@colchesterct.gov
Colebrook, CT	Debra McKeon, Town Clerk (860) 379-3359 dmckeon@colebrooktownhall.org
Cornwall, CT	Vera Dineen, Town Clerk (860) 672-2709 cwltownclerk@optonline.net
Coventry, CT	Lori Tollman, Town Clerk (860) 742-7966 ltollmann@coventryct.org



Durham, CT	Kim Garvis, Town Clerk (860) 349-3453 kgarvis@townofdurhamct.org
East Hampton, CT	Kelly Bilodeau, Town Clerk (860) 267-2519 kbilodeau@easthamptonct.gov
East Haven, CT	Lisa Balter, Town Clerk (203) 468-3201 <u>Ibalter@townofeasthavenct.org</u>
Fairfield, CT	Betsy Browne, Town Clerk (203) 256-3090 bbrowne@town.fairfield.ct.us
Hartford, CT	Noel McGregor, Jr., Town and City Clerk (860) 757-9750 noel.mcgregor@hartford.gov
Kent, CT	Darlene Brady, Town Clerk (860) 927-3433 townclerk@townofkentct.org
Killingly, CT	Elizabeth Wilson, Town Clerk (860) 779-5308 lwilson@killinglyct.org
Naugatuck, CT	Michelle Dowling, Town Clerk (203) 720-7055 townclerknaug@sbcglobal.net
New Haven, CT	Michael Smart, City Clerk (203) 946-8349 msmart@newhavenct.gov
Newtown, CT	Debbie Aurelia Halstead, Town Clerk (203) 270-4210 debbie.halstead@newtown-ct.gov



Norfolk, CT	Linda Perkins, Town Clerk (860) 542-5679 nfkclerk@snet.net
Orange, CT	Mary E. Shaw, Town Clerk (203) 891-2122 mshaw@orange-ct.gov
Plainfield, CT	Dianne Talbot, Town Clerk (860) 230-3010 dtalbot@plainfieldct.org
Redding, CT	Michele Grande, Town Clerk (203) 938-2377 townclerk@townofreddingct.org
Ridgefield, CT	Wendy Gannon Lionetti, Town Clerk (203) 431-2783 townclerk@ridgefieldct.org
Rocky Hill, CT	Sandra Merrill Wieleba, Town Clerk (860) 258-2705 townclerk@rockyhillct.gov
Salisbury, CT	Patricia Williams, Town Clerk (860) 435-5182 pwilliams@salisburyct.us
Sharon, CT	Linda Amerighi, Town Clerk (860) 364-5224 sharontownclerk@yahoo.com
Shelton, CT	Margaret Domorod, City and Town Clerk (203) 924-1555 m.domorod@cityofshelton.org
Stratford, CT	Susan Pawluk, Town Clerk (203) 385-4020 spawluk@townofstratford.com



Thompson, CT	Renee Waldron, Town Clerk (860) 923-9900 townclerk@thompsonct.org
Torrington, CT	Carol Anderson, City and Town Clerk (860) 489-2241 carol_anderson@torringtonct.org
Warren, CT	Julie Wechter, Town Clerk (860) 868-7881 townclerk@warrenct.org
Waterbury, CT	Antoinette Spinelli, Town Clerk (203) 574-6806 townclerk@waterburyct.us
Westbrook, CT	Joan Angelini, Town Clerk (860) 399-3044 jangelini@westbrookct.us
West Haven, CT	Patricia Horvath, City Clerk (203) 937-3534 phorvath@westhaven-ct.gov
Windham, CT	Patricia Spruance, Town Clerk (860) 465-3013 pspruance@windhamct.com
Windsor, CT	Anna Posniak, Town Clerk (860) 285-1902 townclerk@townofwindsorct.com
Woodbury, CT	Maria Mancini, Town Clerk (203) 263-2144 mmancini@woodburyct.org
Woodstock, CT	Judy Walberg, Town Clerk (860) 928-6595 townclerk@woodstockct.gov

III. Sample Project Plan and Implementation Approach

A. Project Timeline

A more detailed plan will evolve after in-depth evaluation and discussion with the Town Clerk, IT staff, and any other stakeholders, expanding on the following phases:

PHASE	TASKS					
	Gather detailed information about business practices to build fee schedules, document codes, reports, etc.					
1. Site Preparation	Analyze networking environment					
	Set up project management portal					
	Write, test, and debug conversion/upload programs					
2. Data and Image Conversion	Meet with Clerk's Office staff to review results					
	Upload data to new system					
	Configure all necessary hardware					
3. Installation	Install and configure software					
	Upload any remaining unconverted data					
	Assign lead trainer to project					
4. Training	Develop custom training program					
	Provide extensive on-site training to designated personnel					
5. Implementation	 Schedule after all hardware and software are tested, converted data is uploaded, and staff has successfully completed training 					
("Go Live")	IQS staff remain on site to provide technical and training support as needed					



1. Site Preparation

The main objectives during this phase are to gather detailed information regarding the Town Clerk's business processes, analyze the networking environment that the system will interact with, and determine system hardware placement.

During this phase, IQS system staff will be meeting with the Town Clerk's office to gather information necessary to prepare the system's reference tables. This information will be used to build fee schedules, document codes, reports, etc. IQS will discuss implementing data sharing protocols with any interested departments, such as finance.

We will also be meeting with City IT to determine the level of involvement needed. Typically, involvement is limited to the provision of data from the legacy system, any network settings, and system access if applicable.

IQS can set up a project management portal to keep project stakeholders up-to-date throughout the process.

2. Data and Image Conversion

IQS has developed numerous auditing and validation procedures to ensure an accurate and complete data conversion process. Our expert team members have overseen the conversion of millions of index lines and images.

IQS will write, test, and debug any necessary conversion programs. We will meet on a regular basis with staff to review the results of the data conversion process prior to uploading to the new system.

We take complete responsibility for the conversion process. The Town Clerk should not expect to have to do any extensive corrections of the converted data. IQS regards converted data that requires extensive corrections by staff an unacceptable outcome.

3. Installation

During this phase, software is installed and configured for each workstation and server. All hardware and software are tested.

Usernames, passwords, permissions, and other accessibility measures are finalized. Any remaining unconverted data is uploaded to the system at this time. This generally occurs the weekend before going live with the new system.



4. Training

A lead trainer will be assigned to the project and a custom training program will be developed based upon the results of the site assessment.

As part of the agreement, IQS provides unlimited on-site support and training. Extensive training will be provided in all areas of system use, maintenance, and hardware. IQS will provide on-site training to Clerk's Office staff, IT, and other personnel designated by the Town Clerk. Sessions can also be conducted for abstractors and public users. Learning will be reinforced by hands-on use of the test database which is populated with converted data.

IQS recognizes that no two offices are alike. Therefore, we constantly monitor training progress and adjust the duration and number of sessions according to user progress. Our training supervisor will communicate frequently with the Town Clerk to discuss progress and assess future training needs, especially during the first month of system implementation.

Furthermore, IQS training staff will be on-site during the first week of system launch to assist staff as needed. Training will continue as the situation warrants. It is our practice to provide training as long as it is needed instead of providing an arbitrary number of training hours.

5. Implementation ("Go Live")

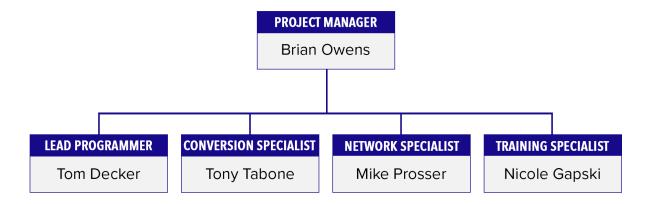
This phase is scheduled once all aspects of the system hardware and software have been tested, the converted data is uploaded to the system, and staff has successfully completed training.

IQS programming, training, and networking staff will be available on-site minimally for the first week to provide technical and training support as needed.

Toward the end of the first week, the IQS Project Manager will meet with the Town Clerk to discuss any system implementation issues that arise and determine which IQS personnel are required to remain on-site. A plan will also be developed to address any outstanding system or staff issues.



B. Project Team



Brian Owens, Project Manager

Brian has over 10 years of experience in the records management industry. He has overseen countless projects which meet or exceed the scope of the project contained in this proposal.

Tom Decker, Lead Programmer

Tom is the lead developer of the proposed solution. He has extensive experience working with a variety of database technologies and programming languages. He is also an expert in data conversion, overseeing the conversion of millions of index lines and images.

Tony Tabone, Conversion Specialist

Tony has over 25 years of experience in the Land Records industry. He has successfully completed numerous conversions, including several systems of the type in use by the Town.

Mike Prosser, Network Specialist

Mike has expertise in networking, hardware, and data storage/transfer technologies. He has successfully managed multiple transfers of land records data to their host servers. He has also been involved in staging and implementing indexing and imaging systems.

Nicole Gapski, Application Training Specialist

Nicole has extensive experience training end users in the software. Her thorough understanding of land records is built on years of on-site consultations with clients. The combination of this practical and training expertise makes her a highly effective trainer, as she can understand applications from both the user and trainer perspectives.

IQS does not outsource or subcontract any project.



IV. Functional Specifications and Requirements

A. System Overview

Our software suite, Solution, integrates all office functions into a user-friendly and easily-adaptable interface. It is designed using Microsoft .NET technologies.

The application logic resides in modules that are independent of both the database and the user interface. This architecture allows functionality to be delivered to both Windows desktop clients and intranet/internet Web clients.

The system features a flexible workflow that can be adjusted as the situation demands. Administrators may easily identify the status of all documents via a real time "Work Status" console which facilitates ad hoc adjustments to workflows.

Users can scan documents at any time during the workflow, including prior to recording.

1. Technology Architecture

Program: Microsoft .NET

Database: Oracle

Server: Windows Server

Workstation: Windows 10 Professional or higher

IQS does not use any proprietary hardware. We can provide hardware recommendations based on our experience with a variety of devices.

2. Security

The application security model uses a familiar users and groups structure. User access to screens and/or specific functions on a screen is easily controlled within the system. Sealed documents require users to have additional security credentials.

The system requires a username and password for access. Security levels are controlled by the system administrator using a flexible administrative interface within the program. Various access levels are granted for processing rights such as scanning, indexing, cashiering, reporting, and searching. Additional access levels are granted for supervisory functions such as voiding, revising/editing transactions, rescanning, deleting records, etc.

The system maintains extensive audit logs which record all modifications made to transactions and the administrative tables.



B. Software Features

1. Data Entry

Data entry screens are optimized for efficiency and accuracy. Where appropriate, data fields have auto-fill or select lists to minimize keystrokes. Repeated data may be carried over from one screen to the next, from one document to the next, or held in a clipboard ring. Validation and auto-cleanup rules may be applied to fields to ensure consistency of data. Document screens automatically reconfigure to show fields specific to the current document.

2. Fees

Fee formulas may be configured for document groups or individual document types. Fee line items may be exempted or overridden. Pricing for fees (cost per page, per name, etc.) is easily changed by an authorized user. Receipts may be configured to print in either detail or summary mode.

3. Cashiering

The system contains a fully integrated cashiering module. All tax and fee calculation methods are supported.

Main features include:

- Ability to optionally fully index a document at the counter
- Ability to optionally scan at the counter
- Easily rearrange documents on a receipt prior to recording
- Ability to guickly enter multiple documents of the same type (e.g. tax liens)
- Ability to suspend a transaction
- Ability to automatically generate rejection letters
- Ability to automatically generate certified copies
- Simple one-click method to manage apportionments
- Integration with financial packages (e.g. MUNIS, Quick Books)

4. Indexing

Indexing can be performed at either the cashiering stage or later. The indexing module features a queue whereby the user either predefines attributes of the documents to be indexed (e.g. deeds only) or simply requests the next document in the queue.



Main features include:

- Optimized screen layout for indexing from the scanned image
- Dual monitor support
- Multiple devices to facilitate more efficient indexing (lookup tables, repeat keys, etc.)
- User-defined filters for record selection
- One-click access to view document receipt from the screen
- Easily regenerate a cover page from the indexing screen when information initially entered at the counter was inaccurate

5. Verification

The verification module provides ultimate flexibility for the user. The system supports sight, key, and combination verification options. Selection criteria may be defined by the user in the same manner as the indexing module.

Main features include:

- Optimized screen layout for verifying from the scanned image
- Dual monitor support
- User-defined filters for record selection
- One-click access to view document receipt from the screen
- Easily regenerate a cover page from the indexing screen when information initially entered at the counter was inaccurate

6. Imaging

The system supports both single and batch scanning during any point in the workflow. The scanning module contains numerous automatic and manual cleanup functions as well as the ability to skip blank pages and automatically detect the page length.

7. E-Recording

Solution has fully-integrated E-Recording capabilities. Documents are received in a queue for staff to review. They can then be electronically stamped and recorded. If a document needs to be rejected, a rejection letter can be customized and sent back to the submitter electronically.

We are integrated with all E-Recording vendors currently in the State of Connecticut.



8. Dog Registry System

The dog registry system allows for easy retrieval of information, fast processing of new and renewal transactions, and the printing of dog licenses.

Main features include:

- Issuing original licenses, renewals, replacement tags, or transfers
- Full reporting suite to fulfill local and state requirements
- Rabies tracking and reporting
- Secure internet lookup for animal control or law enforcement

IQS offers an online dog license renewal service during the open renewal period. Dog owners can look up their registrations and pay through an easy-to-use website. The website calculates the amount due and seamlessly updates information in the Solution software. The Clerk's Office can quickly process registrations through a queue, assigning tag numbers and printing licenses with one click.

9. Vital Records

The vital records program allows users to index and scan birth, death, and marriage records.

Main features include:

- Monthly reporting, including billing reports
- Ability to print and certify copies of records
- Efficient records search

10. Public Search

The in-office public search module is simple enough for the average user, yet powerful enough for the professional.

Main features include:

- Ability to view results in index or document mode
- Ability to simultaneously search multiple names, document types, and municipalities
- Ability to search names on both sides of a document (e.g. Deed where John Smith is the Grantor and Mary Jones is the Grantee)
- Document cart for easy printing of entire documents or specific pages
- Supports escrow or drawdown accounts for document printing



 Features document queue for the general public prints, allowing prints to be released when payment is collected.

The system also includes an internet access component at **SearchIQS.com**. IQS handles customer support, maintenance, and fee collection. Public users will only see documents designated by the Town Clerk; staff members can be given password-protected access to other data.

Images and data from the Town's in-house production server are replicated and stored on a web server maintained at our Liverpool, NY facility. IQS maintains redundant fiber optic lines to maximize system uptime and an automatic natural gas generator to provide service continuity.

11. Reporting

The application uses Crystal Reports as the main report engine. Reports can be printed or exported in several formats including Microsoft Word, Excel, and PDF.

The Report Explorer module categorizes and displays the authorized reports for each user. Reports can be archived for future reference.

IQS will develop custom reports as needed at no extra cost to the Town.

12. Archiving

A variety of archiving methods are available to ensure the permanence of the Town's critical data. The system provides a simple method to prepare scanned images for conversion to archival microfilm. Images can be exported to a variety of formats suitable for archiving, including TIFF and PDF.

13. Data Integration

A great deal of information originating in the Town Clerk's office is consumed by other departments. IQS is eager to work with municipalities who wish to make that process more efficient and accurate. It is rare that these efforts result in extra fees.

14. Fraud Alert

Fraud Alert allows users to sign up online and receive email alerts whenever a document, such as a deed or mortgage, is recorded under their name in the Clerk's Office. It gives homeowners peace of mind and allows them to quickly take action on unauthorized transactions.

Info Quick Solutions, Inc.





IQS offers this service at no cost to the City or its constituents. It is available at https://searchigs.com/fraudalert.



C. Ongoing Services

1. Training and Support

Unlimited training and support are included for the duration of the contract. This includes both remote and on-site methods, depending on the situation.

IQS provides email and toll-free telephone support Monday through Friday from 8:00 AM to 5:00 PM EST.

Our support procedure is as follows:

- 1. Call or email is received by technical support personnel
- 2. Severity level is determined
- 3. Support specialist responds within required time frame
- 4. Problem resolution

IQS responds to support calls in relation to problem severity. For example, mission critical failures such as the system being down will receive immediate action. IQS will respond to less severe issues within 1 hour.

2. Software Updates

Our philosophy is that software is never done. As a result, feature updates and enhancements are provided at no additional charge during the contract.

Historically, major updates have been delivered every six months. This occurs primarily through a VPN connection during non-business hours.

Our modular design provides users with ultimate flexibility. Although all customers receive the upgrades, features may be enabled or disabled based upon customer preference.

Since IQS maintains all customers on the current version of the software, there are no end of life cycle issues.

IQS utilizes several methods to keep customers current with any system changes or updates including user group meetings, our website, webinars, and email. When updates become available, IQS will contact the Clerk to determine the best method to deliver the update or change. Updates could be delivered either remotely or on-site.

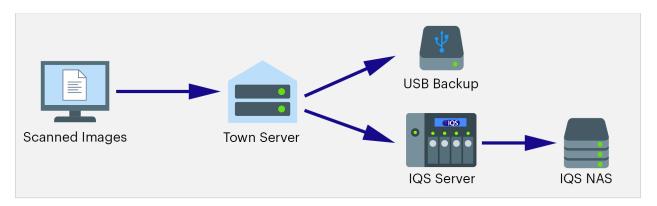


3. Data Security, Backup, and Disaster Recovery

IQS maintains rigorous cybersecurity controls of our internal systems. Network traffic and devices are monitored 24/7/365 with instant incident response.

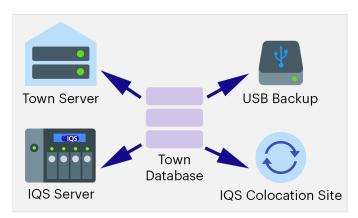
IQS has stringent backup policies in place to ensure the safety and security of the Town Clerk's data.

Image Backup



Images are immediately backed up to a USB backup drive on the server as they are scanned. They are simultaneously pushed across the internet to our FTP site. Once a day, those images are backed up from our storage server over to our NAS. IQS verifies that all files are accounted for at the end of each month.

Database Backup



IQS runs scripts that securely transmit the database over an encrypted VPN tunnel to our servers. There is also a copy that gets transferred over to an external hard drive at the client facility, a copy on the Town Clerk's server, and a copy at the IQS colocation site.

Our customers are not dependent upon IQS to run on a day-to-day basis. All processing is done at the client site.

IQS maintains redundant fiber optic lines as well as a gas-powered backup generator.

In the event of a system failure, IQS would provide remote access to the database while restoring local hardware and software.



D. Hardware Proposal

IQS uses high-quality brands such as HP and Fujitsu. All provided hardware includes full technical support and setup, maintenance, and replacement, if needed.

COMPONENT	QUANTITY
Server	1
Workstations Desktop computer, monitor, keyboard, mouse	5
Desktop Scanners	7
Receipt Printers	4
Network Printers	2
Large Format Print/Scan Workstation	1
Public Search Workstations Desktop computer, monitor, keyboard, mouse	4



V. Pricing Proposal

1. Solution Application Software and Licenses

- Solution recording software and departmental licenses to include land, plans, dog licensing (including online renewal portal), vitals (including online marriage application portal), probate, liquor, victualing, and other business license indexing
- Solution enhancements and upgrades
- Software or reporting changes required by state or federal legislation
- Custom report writing
- All software licenses including database, server, workstation

2. Professional Services

- Data conversion
- Site preparation visits
- Staging, installation, and configuration of all software
- Unlimited software training and support
- Offsite backup/disaster recovery
- Hardware integration and configuration

3. Hardware

- Hardware listed in <u>Section IV.D</u>.
- Unlimited support, including replacement or repair, for all IQS-provided hardware

ITEM	PRICE
Software Only	\$3950/month
Software and Hardware	\$5150/month
Online Records Lookup	Revenue share; Town Clerk retains \$1 per page

Brian J. Owens

Vice President of Sales

March 10, 2022

Date

Term is 60 Months, pricing is good for 120 Days



VI. Required Forms

- Contractor's Statement
- Non-Collusion Affidavit
- Certificate of Corporate Resolution
- Proposer's Information and Acknowledgement Form
- Department of the Treasury Internal Revenue Service Form W-9
- Commission on Human Rights and Opportunities Contract Compliance Regulations Notification to Bidders Form

Contractor's Statement

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following: If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members: N/A If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% if the common or preferred stock of said holding company. Bernard J. Owens 2977 Nuha St. Baldwinsville, NY 13207 The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford. N/A Name of Bidder/Proposer: Brian J. Owens Signature of Bidder/Proposer: Title: Vice President, Sales Company Name: Info Quick Solutions, Inc. Address: 7460 Morgan Rd. Liverpool, NY 13090 Indicate if company submitting this proposal is: _____MBE ____WBE ____DBE

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

- 1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.
- 2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
- 3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

Name of Proposer: Info Quick Solutions,	Inc.	
By:		
Print Name: Brian J. Owens		
Title: Vice President, Sales		
ACKNOWLEDGMENT		
STATE OF New York	_	
county of Ononodaga	ss	
Date: 3-9-22		
Personally appeared Brian O	wens, as Vsle	Presiden+
of the above named firm, and attested that t	he foregoing statements are true	e and accurate to the
best of his/her knowledge and belief.	1	
	Christin A	. Jun
	Signature of Notary Public My Commission Expires:	2023
EFFECTIVE: 2/24/09	A Training	

CERTIFICATE OF CORPORATE RESOLUTION RFQ/RFP

I, Christine Lohr , SECRETARY OF Info Quick Solutions, Inc.
A CORPORATION EXISTING UNDER THE LAWS OF THE STATE OF New York , DO
HEREBY CERTIFY THAT THE FOLLOWING IS A TRUE COPY OF CERTAIN RESOLUTIONS
ADOPTED BY THE BOARD OF DIRECTORS OF SAID COMPANY, AT A MEETING THEREOF
DULY CALLED AND HELD ON THE 4th DAY OF March , 2022 .
"RESOLVED, THAT THE Vice President
OF THE CORPORATION BE AND IS HEREBY AUTHORIZED TO SIGN
A CONTRACT WITH THE CITY OF STAMFORD, CONNECTICUT FOR
Integrated Land Records and Vital Statistics Recording System, RFP/RFQ No859
I, FURTHER CERTIFY THAT, Brian Owens IS THE DULY
ELECTED Vice President OF Info Quick Solutions
AND THE FOREGOING RESOLUTION HAS NOT BEEN MODIFIED OR REPEALED AND IS
IN FULL FORCE AND EFFECT.
IN WITNESS WHEREOF, I HAVE, HEREUNTO, SUBSCRIBED BY NAME AND AFFIXED THE SEAL OF SAID CORPORATION THE $\frac{9\text{M}}{20\text{ Day}}$ Day of $\frac{\text{March}}{20\text{ Day}}$.

SECRETARY

PROPOSER'S INFORMATION AND ACKNOWLEDGEMENT FORM

RFP No: 859		
Date: March 10, 2022		
Proposer's Name: Info Quick Solutions, In	C.	
Street Address: 7460 Morgan Road		
Liverpool	NY	13090
City	State	Zip
Business Telephone: (800) 320-2617		
Email: briano@iqsworks.com		
DUNS Number: 00-938-2602	Tax Id. N	Jo.: <u>16-1573412</u>
Indicate (Yes/No) if company submitting	g this proposal is:	
MBE (If yes, attach relevant certification)	WBE	DBE
Signature:	Da	.te:_ 3/9/22
Printed Name: Brian J. Owens		
Title: Vice President, Sales		
Addenda Acknowledgement – check and	d note date of addenc	ium
☑ Addenda No. 1 3/4/22	☐ Addenda N	
☐ Addenda No. 3	☐ Addenda N	
☐ Addenda No. 5	☐ Addenda N	0. 6
☐ Addenda No. 7	☐ Addenda N	o. 8
☐ Addenda No. 9	☐ Addenda N	
☐ Addenda No. 11	☐ Addenda N	o. 12

(Rev. December 2014)

Department of the Treasury

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS

Interna	Revenue Service	ľ						- (00114	10 0.0	
	1 Name (as shown	on your income tax ret	um). Name is requi	red on this line; do	not leave this line blank.				-		
	Into	Quiz K	Solution	5 In							
જાં	2 Business name/o	isregarded entity name	, if different from a	bove	<u></u>						
page,											
ς σ	3 Check appropria	te box for federal tax cl	assification; check	only one of the fol	lowing seven boxes:			4 Exempti	ons (cod	es apply	only to
800	☐ Individual/sole proprietor or ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate						certain entities, not individuals; see instructions on page 3):				
ğ. <u>Ş</u>	single-member LLC Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶						Exempt payes code (if any)				
2 2					ck the appropriate box is			Exemption	from FA	TCA reno	ortion
Print or type Instructions	the tax classifi	cation of the single-me	mber owner.	TO CHOCK ELO, GIR	ock rite appropriate pox ii	n une une	above for	code (if an		. с ср.	
돈능	Other (see inst							(Applies to acc	·	ined outside	the U.S.)
Print or type Specific Instructions on	5 Address (number	, street, and apt. or sui	e no.)			Reque	ster's name a	and address	(optiona)	
Š	7460	Morgan R	oad								
See S	6 City, state, and Z	iP code				1					
ď	Livera	pool MY	13090								
	7 List account num	ber(s) here (optional)									
Par	Taxpay	er Identification	n Number (T	IN)	-						
Enter	your TIN in the apr	propriate box. The TI	N provided must	match the name	e given on line 1 to av	roid	Social sec	urity numb	er		
backu	p withholding. For	individuals, this is g	eneraliv vour soc	ial security num	ber (SSN), However, f	ora		7 67	$\neg \neg$	T	
entitie	nt alien, sole propr s. it is vour employ	retor, or disregarded ver identification num	i entity, see the i	do not have a n	on page 3. For other umber, see How to ge	r of n		-	-		
TIN or	page 3.		.50. (2.11). 11 700	do not nave a m	sincer, see now to ge	ii d	cr				LL
Note.	If the account is in	more than one nam	e, see the instru	ctions for line 1 a	and the chart on page	4 for		identification	on numb	er	
guidel	ines on whose nur	nber to enter.	•		and and an article page					T	
							/ 6 '	-1/5	7 3	41	2
Part											
Under	penalties of perjur	y, I certify that:		•							
1. The	number shown or	n this form is my cor	rect taxpayer ide	ntification numb	er (or I am waiting for	a numi	ber to be is:	sued to me); and		
Ser	vice (IRS) that I an	tckup withholding be n subject to backup packup withholding;	withholding as a	exempt from bac result of a failure	kup withholding, or (be to report all interest) I have or divid	not been r lends, or (c)	notified by the IRS ha	the Inter as notific	mal Rev ed me ti	enue hat I am
3. lar	n a U.S. citizen or	other U.S. person (d	efined below): ar	nd							
					from FATCA reportin	ıa is coı	rrect				
Certifi	cation instruction	18. You must cross o	out item 2 above	if you have been	notified by the IRS th	hat vou	are current	ly subject t	n hacki	ın witht	oldina
Decau	se you have failed	to report all interest	and dividends or	n vour tax return	. For real estate trans	actions	item 2 dos	e not enal	V Form	ortopo	
Cenera	it paid, acquisition	or abandonment of	secured property	y, cancellation of	f debt, contributions to sign the certification,	o an inc	dividual reti	rement arra	ingeme	nt (IRA),	and
instruc	tions on page 3.	n dien diterest and t	ividends, you ar	e not required to	sign the certification,	, but yo	u must pro	vide your c	orrect i	IN. See	tne
Sign	Signature of	00	- 11				$\overline{\alpha}$				
Here	U.S. person ▶	Chisn	~ hl	2	Da	ete ►	5-12	-22	>		
Gen	eral Instruc	tions		· · · · · · · · · · · · · · · · · · ·	Form 1098 (home mo (tuition)	rtgage ir				rest), 109	8-T
Section	references are to the	e Internal Revenue Cod	e unless otherwise	noted.	- Farm 1000 O (

Future developments, Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/tw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

- 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- 2. Certify that you are not subject to backup withholding, or
- 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See What is FATCA reporting? on page 2 for further information.

COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES CONTRACT COMPLIANCE REGULATIONS NOTIFICATION TO BIDDERS

(Revised 09/3/15)

The contract to be awarded is subject to contract compliance requirements mandated by Sections 4a-60 and 4a-60a of the Connecticut General Statutes; and, when the awarding agency is the State, Sections 46a-71(d) and 46a-81i(d) of the Connecticut General Statutes. There are Contract Compliance Regulations codified at Section 46a-68j-21 through 43 of the Regulations of Connecticut State Agencies, which establish a procedure for awarding all contracts covered by Sections 4a-60 and 46a-71(d) of the Connecticut General Statutes.

According to Section 46a-68j-30(9) of the Contract Compliance Regulations, every agency awarding a contract subject to the contract compliance requirements has an obligation to "aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors and suppliers of materials." "Minority business enterprise" is defined in Section 4a-60 of the Connecticut General Statutes as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: "(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of Section 32-9n." "Minority" groups are defined in Section 32-9n of the Connecticut General Statutes as "(1) Black Americans . . . (2) Hispanic Americans . . . (3) persons who have origins in the Iberian Peninsula . . . (4)Women . . . (5) Asian Pacific Americans and Pacific Islanders; (6) American Indians . . ." An individual with a disability is also a minority business enterprise as provided by Section 4a-60g of the Connecticut General Statutes. The above definitions apply to the contract compliance requirements by virtue of Section 46a-68j-21(11) of the Contract Compliance Regulations.

The awarding agency will consider the following factors when reviewing the bidder's qualifications under the contract compliance requirements:

- (a) the bidder's success in implementing an affirmative action plan;
- (b) the bidder's success in developing an apprenticeship program complying with <u>Sections 46a-68-1 to 46a-68-17</u> of the Administrative Regulations of Connecticut State Agencies, inclusive;
- (c) the bidder's promise to develop and implement a successful affirmative action plan;
- (d) the bidder's submission of employment statistics contained in the "Employment Information Form", indicating that the composition of its workforce is at or near parity when compared to the racial and sexual composition of the workforce in the relevant labor market area; and
- (e) the bidder's promise to set aside a portion of the contract for legitimate minority business enterprises. See Section 46a-68j-30(10)(E) of the Contract Compliance Regulations.

INSTRUCTIONS AND OTHER INFORMATION

The following <u>BIDDER CONTRACT COMPLIANCE MONITORING REPORT</u> must be completed in full, signed, and submitted with the bid for this contract. The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidders compliance to <u>Sections 4a-60</u> and <u>4a-60a CONN. GEN. STAT.</u>, and <u>Sections 46a-68j-23</u> of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder's good faith efforts to include minority business enterprises as subcontractors and suppliers for the work of the contract.

1) Definition of Small Contractor

Section 4a-60g CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding fifteen million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a nonprofit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision 4a-60g CONN. GEN. STAT.

MANAGEMENT: control the major functions of an organization through MAINTENANCE: This category includes occupations subordinates who are at the managerial or supervisory level. involving landscaping, housekeeping, and janitorial They make policy decisions and set objectives for the services. Job titles found in this category include company or departments. They are not usually directly supervisors of landscaping or housekeeping, janitors, involved in production or providing services. Examples top executives. public relations managers. managers of operations specialties (such as financial, human resources, or purchasing managers), and construction and engineering managers.

BUSINESS AND FINANCIAL OPERATIONS: occupations include managers and professionals who work with the financial aspects of the business. These occupations roofers, sheet metal workers, elevator installers, include accountants and auditors, purchasing agents, management analysts, labor relations specialists, and budget. credit, and financial analysts.

MARKETING AND SALES: Occupations related to the floor and tile installers and finishers are also included in act or process of buying and selling products and/or this category. First line supervisors, foremen, and helpers services such as sales engineer, retail sales workers and in these trades are also grouped in this category. sales representatives including wholesale.

LEGAL OCCUPATIONS: In-House Counsel who is charged with providing legal advice and services in regards to legal issues that may arise during the course of standard business practices. This category also includes assistive legal occupations such as paralegals, legal assistants.

COMPUTER SPECIALISTS: Professionals responsible for the computer operations within a company are grouped in this category. Examples of job titles in this category include computer programmers, software engineers, database administrators, computer scientists, systems analysts, and computer support specialists

ARCHITECTURE AND ENGINEERING: Occupations related to architecture, surveying, engineering, and drafting are included in this category. Some of the job titles in this category include electrical and electronic engineers, surveyors, architects, drafters, mechanical engineers, materials engineers, mapping technicians, and civil engineers.

OFFICE AND ADMINISTRATIVE SUPPORT: All clerical-type work is included in this category. These jobs operators; refuse and recyclable material collectors; and involve the preparing, transcribing, and preserving of written communications and records; collecting accounts; gathering PRODUCTION WORKERS: The job titles included in and distributing information; operating office machines and electronic data processing equipment; and distributing mail Job titles listed in this category include telephone operators. bill and account collectors, customer service representatives. dispatchers. secretaries and administrative assistants. computer operators and clerks (such as payroll, shipping, stock, mail and file).

Managers plan, organize, direct, and BUILDING AND GROUNDS CLEANING AND maids, grounds maintenance workers, and pest control workers.

> CONSTRUCTION AND **EXTRACTION:** This category includes construction trades and related occupations. Job titles found in this category include These boilermakers, masons (all types), carpenters, construction laborers, electricians, plumbers (and related trades), hazardous materials removal workers, paperhangers, and painters. Paving, surfacing, and tamping equipment operators; drywall and ceiling tile installers; and carpet,

> > INSTALLATION, MAINTENANCE AND REPAIR: Occupations involving the installation, maintenance, and repair of equipment are included in this group. Examples of job titles found here are heating, ac, and refrigeration mechanics and installers; telecommunication line installers and repairers; heavy vehicle and mobile equipment service technicians and mechanics; small engine mechanics; security and fire alarm systems installers; electric/electronic repair, industrial, utility and transportation equipment; millwrights; riggers; and manufactured building and mobile home installers. First line supervisors, foremen, and helpers for these jobs are also included in the category.

MATERIAL MOVING WORKERS: The job titles included in this group are Crane and tower operators; dredge, excavating, and lading machine operators; hoist and winch operators; industrial truck and tractor operators; cleaners of vehicles and equipment; laborers and freight, stock, and material movers, hand; machine feeders and offbearers; packers and packagers, hand; pumping station miscellaneous material moving workers.

this category are chemical production machine setters, operators and tenders; crushing/grinding workers; cutting workers; inspectors, testers sorters, samplers, weighers; precious stone/metal workers; painting workers; operators cementing/gluing machine and tenders; etchers/engravers; molders, shapers and casters except for metal and plastic; and production workers.

3) Definition of Racial and Ethnic Terms (as used in F	Part IV Bidder Employment Information) (Page 3)
White (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East. Black (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa. Hispanic- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.	Asian or Pacific Islander- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa. American Indian or Alaskan Native- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.
BIDDER CONTRACT COMPL PART 1 – Bidder Information	IANCE MONITORING REPORT
Company Name: Info Quick Solutions, Inc.	Bidder Federal Employer 16-1573412
Street Address: 7460 Morgan Road	Identification Number:
City & State: Liverpool, NY 13090	Or
Chief Executive: Bernard J. Owens	Social Security Number:
Major Business Activity: Records Management	Bidder Identification
(brief description)	(response optional/definitions on page 1)
	-Bidder is a small contractor? Yes _No \Bidder is a minority business enterprise? Yes _No \/ (If yes, check ownership category) Black \Hispanic _Asian American _ American Indian/Alaskan Native _Iberian Peninsula _ Individual(s) with a Physical Disability _Female \Bidder is certified as above by State of CT? Yes _No _
Bidder Parent Company: N/A	
(If any)	
Other Locations in CT: N/A	
(If any)	
PART II - Bidder Nondiscrimination Policies and Procedures	
1. Does your company have a written Affirmative	7. Do all of your company contracts and purchase orders contain
Action/Equal Employment Opportunity statement posted on	non-discrimination statements as required by Sections 4a-60 &
company bulletin boards? Yes V No	4a-60a Conn. Gen. Stat.? Yes☑No□
2. Does your company have the state-mandated sexual	8. Do you, upon request, provide reasonable accommodation
harassment prevention in the workplace policy posted on	to employees, or applicants for employment, who have
company bulletin boards?	physical or mental disability?
Yes ✓ No	Yes No No
3. Do you notify all recruitment sources in writing of your	9. Does your company have a mandatory retirement age for all
company's Affirmative Action/Equal Employment Opportunity	employees?
employment policy? Yes ✓ No 4. Do your company advertisements contain a written statement	Yes No /
that you are an Affirmative Action/Equal Opportunity Employer?	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your
Yes No	supervisors? Yes No N/A
5. Do you notify the Ct. State Employment Service of all	11. If your company has apprenticeship programs, do they meet the
employment openings with your company?	Affirmative Action/Equal Employment Opportunity requirements of
Yes No	the apprenticeship standards of the Ct. Dept. of Labor?
	Yes No N/A 🗸
6. Does your company have a collective bargaining	12. Does your company have a written affirmative action Plan?
agreement with workers? Yes \ No \ \	Yes No 🗸
6a. If yes, do the collective bargaining agreements contain	If no, please explain.
non-discrimination clauses covering all workers? Yes No	
	13. Is there a person in your company who is responsible for equal
6b. Have you notified each union in writing of your	employment opportunity? Yes No
commitments under the nondiscrimination requirements	If yes, give name and phone number:
of contracts with the state of CT? Yes□ No□	Christine Lohr, Vice President of Operations — (800) 320-2617
1 1621 LINOL I	(000) 000 E011

Part	III -	Bidder	Subcon	tracting	Practices
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(Page 4)

1. Will the work of this contract include subcontractors or suppliers? Yes No late No
1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes No√

PART IV - Bidder I	Employment	Informat	ion		Date	: :					
JOB CATEGORY*	GORY * OVERALL WHITE (not of TOTALS Hispanic origin)		BLACK	BLACK (not of Hispanic origin)		HISPANIC		SIAN or ACIFIC LANDER	AMERICAN INDIAN or ALASKAN NATIVE		
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management	7	5	2								
Business & Financial Ops											
Marketing & Sales	3	2	1								
Legal Occupations											
Computer Specialists	8	5	3								
Architecture/Engineering											
Office & Admin Support	28	7	20		1						
Bldg/ Grounds Cleaning/Maintenance	!										
Construction & Extraction											
Installation , Maintenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE	46	19	26		1						
Total One Year Ago	46	19	26		1						
	FORM	IAL ON THE J	OB TRAINEES	ENTER FIGU	JRES FOR THE SA	ME CATEG	ORIES AS AI	RE SHOWN	ABOVE)		
Apprentices											
Trainees											

^{*}NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

PART V - Bidder Hiring and Recruitment Practices					(Page 5)			
Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)		requireme) any of the below listed ents that you use as ualification			tices or actions that you take which note employees without discrimination		
SOURCE	YES	NO	% of applicants provided by source					
State Employment Service		V		X	Work Experience			
Private Employment Agencies		Ø		X	Ability to Speak or Write English			
Schools and Colleges		7			Written Tests			
Newspaper Advertisement	V		34		High School Diploma			
Walk Ins	V		33		College Degree			
Present Employees	V		33		Union Membership			
Labor Organizations		V		X	Personal Recommendation			
Minority/Community Organizations		V			Height or Weight			
Others (please identify)		7			Car Ownership			
					Arrest Record			
					Wage Garnishments			
MONITORING REPORT	are comple	ete and tru	e to the best of my kr	owledge and be	igning). I certify that the statems lief, and are made in good faith. tions of the CONN. GEN. STAT	I understand		NTRACT COMPLIANCE any misstatements of facts, I am
(Signature)			(Title) Vice President, Sales			(Date Signed) 3/1/22	(Telephone) (800) 320-2617	