

STATEMENT OF WORK TX122214TGC

TOM GREEN COUNTY, TEXAS

SCANNING, STAPLING AND INDEXING (PHASE TWO)

Version 1.5

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Document submitted by Manatron, Inc. – A Thomson Reuters Business

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PROJECT SUMMARY

- Project:** Tom Green County, Texas
Phase Two - Scanning, Stapling and Indexing
- Project Site:** Tom Green County
124 West Beauregard Avenue
San Angelo, TX 76903-5835
- County Contact:** Elizabeth McGill, County Clerk
(325) 659-6553
elizabeth.mcgill@co.tom-green.tx.us
- Target Date of Implementation:** Project to start within 30 days of signing of contract.
- Scope:** TRTA Gov recently completed scanning and data services for the County Clerk's land records volumes dated 1982 through 1993. This project represents the second phase in the digitization of the County Clerk's historical land records and will include similar services for the remainder of the same land record books from the beginning of the County up to 1982. This will be a multi-year project performed as budget allows.
- For this project, TRTA Gov will scan specific land records volumes from microfilm or original books where specific microfilm rolls are determined to be unsuitable for scanning. Images of land records volumes will be assembled into documents and fully indexed for typed documents and partially indexed for handwritten documents.
- The County Clerk's film library is currently stored at TRTA Gov's archival storage facility in Austin, Texas. The microfilm inventory will be evaluated to identify the volumes eligible and suitable for scanning under this project.
- Technology:** Hardware -
The finished digitized images and indexes will be formatted and prepared for loading into the County's record management system.

This Statement of Work outlines deliverables, assumptions, and a high-level scope of work. In response to the planning phase of this project, updated project documentation and a detailed schedule will be mutually agreed upon by Manatron, Inc. - a Thomson Reuters Business ("Thomson Reuters Tax & Accounting, Government" or "TRTA Gov") and Tom Green County, Texas (the "County").

PROJECT OVERVIEW

This Statement of Work ("SOW") defines the areas or scope of work for this project and identifies TRTA Gov and County project responsibilities. It also describes the project management processes for performing this work, the criteria for determining that the work is successfully completed, and the methods to be used to control scope, quality, and costs. Mitigation is defined for any significant project risks that have been identified.

RECOMMENDED HARDWARE

The existing TRTA Gov Anthem server will be used by the County to review the document images and indexes as delivered with this project. Periodically groups of finished batches will be exported for loading by the County's vendor and permanent storage in the County Clerk's records management system. TRTA Gov will provide support to County IT to export the data in the format requested by the vendor.

County IT will be responsible for performing regular system backups and providing hardware maintenance coverage. County IT will provide TRTA Gov with VPN access to the Anthem server to remotely manage database loads and access the Anthem software. Prior to the first load, TRTA Gov Technical Services will come to the County to configure and set-up the Anthem workstations and confirm the Anthem software is ready for use. For this project, no new server hardware or software updates are planned for Anthem, MS SQL server or the OS. The TRTA Gov Project Manager will be the County's primary contact for all aspects of the project including Anthem software support requests.

PROJECT IMPLEMENTATION

PURPOSE STATEMENT

The purpose of this project is to implement various scanning, conversion, and data services initiatives for Tom Green County. This Statement of Work describes the work that TRTA Gov is responsible for implementing. Upon SOW signing, a project schedule will be developed between TRTA Gov and the County.

This project consists of scanning and data services for various land records volumes from the beginning of the County up to the start of the current image and index database in approximately 1982, as follows:

1. Planning (project plan);
2. Identify and evaluate project microfilm rolls stored in TRTA Gov's archival storage facility;
3. Document poor quality microfilm rolls and confirm volumes to be scanned from original books;
4. Off-site microfilm scanning services for various land record volumes at TRTA Gov;
5. Image splitting for microfilm rolls containing two images on a frame;
6. On-site book scanning at the County and scanning of replacement pages identified during microfilm scanning;
7. Reverse Photostat images to black lettering on white background;
8. Production image duplication for images containing "Multiple Instruments per Image";
9. Pilot phase for indexing professional services, including a percentage selection of all document types included in this project;
10. Production stapling for land records volumes, as specified;
11. Production required partial indexing of handwritten land records volumes, as specified (beginning of County up until about 1921) and volumes identified as having existing indexes;
12. Production required full indexing of typed land records volumes, as specified;
13. Quality review;
14. Monthly batch deliveries starting with partial indexing batches followed by full indexing batches;
15. County review and acceptance (per monthly batch);
16. Formatting of land records images and indexes, as specified, for vendor loading to County records management system.

SCOPE STATEMENT

Tom Green County has requested that TRTA Gov provide a statement of work to scan and process microfilm and original books representing various land records volumes. Image stapling and indexing services will be provided for specific land record volumes, and the finished documents and indexes will be formatted for vendor loading into the County's records management system.

The County's microfilm library stored at TRTA Gov's archival vault storage facility in Austin, Texas, will be evaluated and assessed to identify quality project microfilm rolls and those volumes which would benefit from scanning from the original book. Existing images scanned by LDS from approximately 1899 through 1921 will also be evaluated for image data reduction and manual excess border cropping.

Following evaluation of the microfilm rolls a formal inventory of all volumes will be organized and grouped based on the scanning and enhancement services required, and reported to the County.

The project will be processed and delivered over multiple years based on available County budget. The first phase of the project will focus on film scanning to ensure that all volumes and pages targeted for onsite book scanning services are identified in advance. This will be followed by grouping images into documents that have been identified for partial indexing services. Volumes identified for grouping and full indexing will be processed in the succeeding phases of the project based the book type and volume priorities directed by the County.

SCANNING SERVICES

The following chart lists the book types and volume range for the microfilm and books to be scanned and indexed as part of this project. The scanning services proposed include automated image clean-up, manual excess border removal, manual image clean-up (re-scans), film image splitting, Photostat reversal and image duplication, as needed.

On-site scanning costs are included in the per-image costs and are based on the assumption of a single trip. Two-up microfilm scanning and splitting is estimated based on 175,000 original frames and 350,000 finished images. Manual image enhancement is estimated based on 10% of total images scanned from microfilm and 20% of images scanned from original books. Significant variations to these assumptions would require a change order that could result in an increase or decrease in costs.

The reference to LDS refers to books scanned by the Church of Latter Day Saints, who provided the County with copies of the images on CD's. These pages were scanned in full grayscale and although they are very good quality, they are a very large file size. The County has requested that compression of these images be tested as an alternative to scanning. Based on reviewing samples, TRTA Gov recommends manual excess border removal. Image compression and excess border removal for all LDS images are included in the per-image cost.

Book Type	Volumes To Be Scanned	Volumes To Be Indexed	Comments
Deeds	A-Z and 1-740	102-690	Handwritten A-Z & 1-84 (1/2/1916), LDS 19-101 (10/16/1899 to 3/4/1921), Photostats 253-509 (12/2/1968), Indexing to start with end of LDS or Volume 102 (1921)
Deed of Trust	A-Z and 1-473	15-419	Handwritten A-Z & 1-6, LDS O-Z & 1-14 (1901-1921), Photostats 103-281 (1/22/1968), Indexing to start with end of LDS or Volume 15 (1921)
Mechanics Lien	1-143 & 146	1-115	No handwritten or LDS, Photostats 38-86 (1/22/1968), system indexes start with Volume 116
Power of Attorney	1-19	1-11	No handwritten, Photostats 5-8 (1/22/1968), system indexes start with Volume 12

Abstract of Judgment	1-29	1-24	No handwritten, Photostats 16-21 (1/22/1968, system indexes start with Volume 25
Federal & State Tax Liens	1-13	1-10	No handwritten or Photostats, system indexes start with Volume 11
Lis Pendens	1-4	1-3	No handwritten or Photostats, system indexes start with Volume 4
Miscellaneous Records	1-7	1-7	No handwritten, Photostats 1 & 2 (1/22/1968), no existing system indexes
State Tax Liens	1-9	1-5	No handwritten or Photostats, system indexes start with Volume 6
Condominiums	1-3	1-3	No handwritten or Photostats, no existing system indexes
Old Tom Green (Liens & Bonds)	1	1	Handwritten, no existing system indexes

PILOT SPECIFICATIONS

TRTA Gov will perform a comprehensive pilot for approximately 10% of the volumes, performing all project indexing services with the purpose of setting quality standards for all identified record and media types/formats. During project planning the option of including a scanning services Pilot will be reviewed and confirmed based on the County's preference.

1. Inventory:

- a. Prior to scanning, TRTA Gov will confirm with the County the microfilm inventory of all volumes to be scanned and the volumes to be indexed, and will enter them into TRTA Gov's inventory management system.
- b. Each microfilm roll will be assessed prior to scanning to determine if the image quality is too poor to view and capture the necessary information.
- c. TRTA Gov will document unacceptable microfilm rolls and confirm that the original books are available for onsite scanning. Pending film assessment, it is assumed that all Photostat volumes and all volumes that pre-date the LDS images will produce significantly better images when scanned from the original books.
- d. Each volume and roll will be considered a "batch" and will be tracked through TRTA Gov's system as a batch.

2. Off-Site Scanning for Microfilm Rolls:

- a. TRTA Gov will identify record types that will present special image challenges, including 2-up microfilm frames, excessive poor quality images, Photostat records, and run-on instrument pages.
- b. TRTA Gov will work with the County to establish agreed-upon image clean-up standards and services.
- c. If elected by the County, the Pilot Phase film rolls will be processed through all required image enhancement steps to establish image quality standards and finalize project scope.
- d. The following production project steps will be performed as part of the Pilot Phase (if elected):
 - i. Scanning;
 - ii. Auto-image clean-up;
 - iii. Manual excess border removal and manual image enhancement (re-scans)
- e. The Pilot Phase will be processed and evaluated based on the following criteria:
 - i. 2-Up Image splitting:
 - Film images containing book images where the image is captured with a planetary camera and both pages of an open book are captured in a single frame.
 - The printable image for each certificate will be a standard letter-sized image.
 - TRTA Gov has assumed that 2-up images exist from approximately 1971 forward and has included the cost of processing based on this assumption in this SOW.
 - ii. Image Cleanup:



- TRTA Gov will automatically crop and manually remove excess borders for each image/page for optimum file compression.
 - TRTA Gov will provide image polarity reversal for all negative images.
 - TRTA Gov will auto-deskew 100% of the images scanned.
- iii. Poor quality image processing:
- Each poor image will be visually identified for review (images with handwriting, backside bleed-through, etc.).
 - TRTA Gov will submit a report to the County detailing each image of poor quality.
 - As the TRTA Gov verification specialists identify each of these special image types, the image will be tagged in the workflow process.
 - TRTA Gov has estimated that 10% of all microfilm rolls will require poor quality image re-processing and has included this within the costs submitted with this SOW. If this percentage is higher or lower, processing costs may need to be adjusted.
- iv. Dual polarity reversal (Photostat reversal step):
- On the last page of each Photostat record, a certification strip is present with an opposite contrast to the rest of the document.
 - TRTA Gov will reverse just the certification strip to create a 100% positive image. The cost of this "dual polarity reversal" is included in this SOW.
3. On-Site Book and Replacement Page Scanning:
- a. TRTA Gov staff will create an inventory report of all books and replacement pages that require on-site scanning. The report will contain the type of book, volume number, and page count, which will be reconciled to the inventory listed in the inventory management system.
 - b. It is assumed that onsite book scanning will include at a minimum all Photostat volumes and volumes that pre-date the LDS images (approximately 1899).
 - c. Books prior to approximately January, 1968 (or the end of Photostats) will contain run-on instruments that will require duplication and pagination as described under "Run-On Instruments".
 - d. Some books may have sewn bindings, and some will have oversized pages.
 - e. Auto Image Clean-Up:
 - i. TRTA Gov will provide auto-image cropping for 100% of images/pages scanned.
 - ii. TRTA Gov will provide auto de-skew for 100% of images scanned.
 - iii. TRTA Gov will reverse polarity for all negative images.
 - iv. TRTA Gov will manually remove all excess black borders.
 - v. TRTA Gov will identify and manually enhance an estimated 20% of the images scanned.
4. Folder and Image Indexing:
- a. Folder level -
 - i. Book type;
 - ii. Volume number.
 - b. Image level -
 - i. Volume number;
 - ii. Page number.
5. Instrument Stapling and Indexing:
- a. Run-on instrument images:
 - i. Duplicating and pagination - The film images dated prior to approximately January, 1968 (or the end of Photostats) will require page duplication because of run-on instruments where single book pages contain elements of more than one instrument.
 - ii. TRTA Gov has included the cost of processing all "run-on" images with the necessary duplicating and instrument electronic stapling as part of the partial and full indexing costs.
 - b. All images will be stapled by instrument and indexed to specifications.
 - c. By viewing the scanned images, TRTA Gov will identify the beginning and end of each instrument and

"bookmark" or staple these images. This process involves programmatically associating all images for each instrument. The output of this process will be that, upon searching for an instrument, the precise and exact images for each instrument will be viewable.
 - d. TRTA Gov will work with the County to identify the requested indexing protocol. The fields TRTA Gov will

index for the typed volumes for all book types from approximately 1921 up to the start of the County's system indexes are as follows:

- i. Grantor – all
 1. Last name
 2. First
 3. Role/status
- ii. Grantee – all
 1. Last name
 2. First name
 3. Role/status
- iii. Instrument number as stamped on the document
- iv. Book type
- v. Document type will equal book type
- vi. Volume number and page number
- vii. Date recorded (counter date)
- viii. Legal description

- | | | |
|----------|------------|----------------|
| 1. Lot | 2. Section | 3. Subdivision |
| 4. Block | 5. Acreage | |

6. TRTA Gov will provide minimal document indexing for the handwritten volumes for all book types from the beginning of the County up until approximately 1921 and for indexes that already exist in the County's production system. Once loaded into Anthem or the County's records management system, it is the County Clerk's intention to assign staff to complete the indexing of these documents. In order to maintain volume numerical continuity, some typed books will be included in this group. The fields to be indexed are as follows:
 - a. Instrument number as stamped on the document(to be confirmed with the County)
 - b. Book type
 - c. Document type will equal book type
 - d. Volume number and page number
7. Image and Index Delivery:
 - a. TRTA Gov will deliver 100% of the project images as raw JPEG images in folders identified by book type and volume and 100% of the images as Group IV TIFF images in folders identified by book type and volume.
 - b. All images and indexes will be delivered on portable USB drives along with appropriate reviewing software to support County review and acceptance of the finished documents.
 - c. Scanned images will be delivered to the County as monthly batches for review and acceptance.
 - d. Each delivery will include "QC Review" software which will identify all images/pages TRTA Gov considers "poor" using standard clean-up processes.
 - e.
8. Assumptions and Exceptions:
 - a. TRTA Gov will capture all required index data that is present and legible.
 - b. If the required indexing information is illegible or unavailable, TRTA Gov will log this as "Not Indexable," and deliver this information to the County as an error for review.

PILOT REVIEW AND ACCEPTANCE

"Red Light" Project Status

1. Upon completion of all required steps and processes for the Pilot, TRTA Gov will recognize the "Red Light" sign until the County has provided acceptance and sign-off for the Pilot. No additional processing will happen during the Red Light period.
 - a. TRTA Gov will deliver Pilot images via USB drive(s) provided by TRTA Gov.
 - b. The County will be required to plug the Pilot USB drive into the server to be used for image and index review.
 - c. The Pilot and each subsequent batch will be "pushed" or loaded onto the server for the purpose of review by the County.
 - d. The TRTA Gov development lead will log onto the server remotely and load the Pilot images/indexes.
 - e. The County will then review the Pilot using the TRTA Gov provided reviewing tool.



- f. The County will have 30 calendar days to review the Pilot data.
 - g. The County will provide documentation of errors discovered using the provided Data Audit Tool (DAT) and send them to TRTA Gov for remediation.
 - h. Any issues, errors, and/or anomalies associated with the quality of the agreed-upon data services and/or image scanning specifications discovered by the County during the Pilot are to be remediated by TRTA Gov prior to continuation with the project.
 - i. TRTA Gov is to complete all remediation of discovered errors within 10 business days of notification of error via Data Audit Reports.
 - j. Remediation will be done by TRTA Gov per these SOW requirements.
 - k. TRTA Gov will submit the remediation to the County.
2. Assumptions:
- a. TRTA Gov will provide a Data Audit Tool (DAT) for the purpose of submitting found errors or anomalies to TRTA Gov for remediation.
3. Exceptions:
- a. Any changes to the scope of scanning, image clean-up, and/or indexing after the completion of the Pilot will be handled through TRTA Gov's change management process.
4. Special Exceptions:
- a. The price for full-indexing is based on the assumption that all documents to be indexed are typed. This assumption is used because the number of handwritten documents will not be known until scanning and stapling is completed. As part of the Pilot Review and Acceptance process, a change request will be required to adjust the estimate for the number of typed documents and to establish the number of handwritten documents. Any amount more than 5% over the total authorized in this SOW will require approval by the County.
 - b. The County is in the process of contracting with Kofile for preservation services of deteriorating books. Most of these books are early volumes. As part of the service, Kofile scans restored pages as the final step before encapsulation. As part of the inventory review step of this project, TRTA Gov will coordinate with the County to identify which books will be restored within an acceptable timeframe to allow these images to be used as an alternative to scanning by TRTA Gov.
 - c. The Church of Latter Day Saints provided the County with copies of the images on CD's. These books are identified in the inventory summary as LDS in the "Scanning Services" section. The pages were scanned in full grayscale and although they are very good quality, they are a very large file size. The County requests that compression of these images be tested as an alternative to scanning.

PILOT REVIEW MEETING

At the completion of the Pilot, the TRTA Gov project manager will host a Pilot review meeting. The purpose of this meeting will be to confirm the following:

- 1. Production estimates:
 - a. Estimated number of project images;
 - b. Percentage of Photostat images;
 - c. Percentage of images that require the re-scan process to attain the County's requirements for image quality.
- 2. Quality of images using automated cropping and clean-up only.

All parties involved with the acceptance of the Pilot for this project are to be in attendance and prepared to provide sign-off for the Pilot. This meeting will be a combination of on-line and on-site attendance. On-site attendees will be determined at a later date.

By the completion of this meeting, the County and TRTA Gov will have the final production and image quality/clean-up requirements documented, and the applicable acceptance form will be submitted to the County for signature. Upon County

review, acceptance, and sign-off of the image and pre-indexing quality, TRTA Gov will be given the "Green Light" to go into full production for the remainder of this project.

PRODUCTION PROCESSING

"Green Light" Project Status

Upon notification of final acceptance and sign-off of the Pilot by the County, TRTA Gov will be given the "Green Light" signal to move into full production mode. TRTA Gov will perform required indexing of the instrument designated in this SOW as the remainder of this data services project.

1. All microfilm scanning will be performed off-site and will be completed prior to onsite book scanning to ensure that the list of all replacement pages and identified volumes is complete and can be scanned during a single trip
2. TRTA Gov will inventory 100% of the microfilm rolls designated for this project and enter these books types and volumes into the Production Tracking system. Each roll or replacement book and volume will be designated as a batch and tracked as such until completion.
3. TRTA Gov will follow image services and indexing protocol as described in the Pilot section of this document until project completion.
4. TRTA Gov will deliver and load all stapled instrument images onto the County server in monthly batches until project completion. All images and indexes will be able to be reviewed for acceptance using the review software provided by TRTA Gov.
5. As each batch is loaded, the County will review a sampling of the image folders and stapled instruments for batch acceptance.

Upon the final batch load and final acceptance of the stapled instruments, TRTA Gov will format the images and indexes in preparation for loading into the County's records management system.

PROJECT STAKEHOLDERS

Name	Role	Contact Information	Responsibility
Elizabeth McGill, County Clerk	County Sponsor	(325) 659-6553 elizabeth.mcgill@co.tom-green.tx.us	Accepts deliverables; approves change.
Dan Cullerton	TRTA Gov Sponsor	(269) 388-2514 dan.cullerton@thomsonreuters.com	Point of escalation; approves change.
Gary Monico, Chief Deputy	County Project Manager	(325) 659-6551 gary.monico@co.tom-green.tx.us	Monitors schedule and deliverables; coordinates County responsibilities.
Alicia Floyd	TRTA Gov Project Manager	(866) 917-4354 ext. 7485 alicia.floyd@thomsonreuters.com	Monitors schedule and deliverables; coordinates TRTA Gov responsibilities.
TBD	County Technical Resource		Technical expert for County IT environment; works with County project manager for approval and direction.

PROJECT CONTROL PROCESSES AND PROJECT MANAGEMENT PROCEDURES

COMMUNICATIONS PLAN

In order to keep the County and TRTA Gov project managers and the project team informed on the progress of the project, a Communications Plan will be created for the Project Execution Plan. The Communications Plan specifies:

- Meeting schedule;
- What information the weekly status reports will contain; and
- Distribution.

PROJECT STATUS MEETINGS

The County and TRTA Gov project managers will meet regularly to update the project's progress, discuss and approve deliverables, resolve issues, discuss and approve change requests, determine appropriate management actions, and ensure the success of the project. Project team members will also meet as required.

LOCATION OF PROJECT DOCUMENTS, DELIVERABLES, AND FILES

Soft copies of project documents, deliverables, status reports, meeting notes, etc., will be kept by the TRTA Gov project manager electronically and are available upon request.

ISSUE-TRACKING AND RESOLUTION PROCEDURES

In the course of the project, issues will arise that will require documentation and resolution. An issue is defined as a problem or an obstacle that prevents the project from progressing or is inconsistent with the requirements of the contract.

Issue-Tracking Strategy

Issues may be identified by any project team member and escalated to the County and TRTA Gov project managers for review.

- All issues will be logged, tracked and maintained by the TRTA Gov project manager.
- The Issues Log (using TRTA Gov's tracking system) will be made available to each stakeholder upon request.

- Project sponsors will be notified of any issues with potential risk to project scope, schedule, or cost.

Issue Response and Resolution

The TRTA Gov and County project managers will determine activities necessary for responding to issues. They will assign these activities to appropriate team members and are responsible for monitoring whether or not these activities are being completed and whether or not they are effective in reducing the impact of an issue. They will report progress at team meetings, including the effectiveness of previous resolution plans.

CHANGE MANAGEMENT PROCESS

The Change Management Process is put in place to control scope. If processes are not set to handle change in a structured manner, projects will fail to meet expectations and goals, such as budgets, estimates, and schedules.

A "Change of Scope" is defined as a change to any of the following:

- Hardware configuration affecting the performance or capacity of the system;
- A change in the requested volume of books and images to be processed;
- A change in the requested index requirements;
- A change in the requested image scanning, clean-up requirements; or
- Any other change that could affect the project schedule or budget.

Changes to the project, such as delays, changes in scope, change in estimates, etc., will be documented in TRTA Gov's Change Management System. The County or TRTA Gov can initiate these change requests. The party shall identify the nature of the proposed change and reasons for the proposed change.

TRTA Gov shall evaluate the effect of the change set forth in the change request with respect to the feasibility, usability, price, training, acceptance criteria and implementation date of the project. The results of TRTA Gov's evaluation shall be added to and become part of the change request. If TRTA Gov's evaluation of the request is positive, TRTA Gov will propose a specific implementation and specify any additional time and charges necessary for the implementation of the scope change. If TRTA Gov's evaluation is negative, TRTA Gov will provide their rationale for not recommending the change.

TRTA Gov will work jointly with the County to determine mutual interest in pursuing the change request. The County may accept or reject the proposed solution. Should mutual agreement be reached, TRTA Gov shall submit feedback to the County, including impact to timing and price of implementation and maintenance.

RISK CONTINGENCY OUTLINE

A Risk Contingency Outline defines potential risks associated with a project. Its purpose is to provide suggested resolutions ahead of time for the situations that may affect the project timeline and/or budget. By being proactive in identifying possible risk issues and solutions, the impact to the project can be minimized if one of these issues occurs.

Outlined Risks

The project plan will provide a description of the potential risks ("Risk Register") associated with this project, as well as suggested mitigation. A Risk Register is developed as a result of the findings completed in the planning phase. The TRTA Gov project manager will work with the County project manager to detail specific known risks as a deliverable during the analysis phase. Risks may include those pertaining to environment, resources, and performance, among others. Execution of the suggested mitigation would require approval by the County project manager and the TRTA Gov project manager, and may increase the price of the project and/or require added time.

PRICE

TRTA Gov will provide the services described in this Statement of Work for the prices specified below. Pricing is per item, and the estimates below are based on initial understanding of the scope. **The total number of items provided is only an estimate. Billing will be for the actual number of items processed and delivered during the project.**

DESCRIPTION	ESTIMATED PRICE
<p>Project Summary:</p> <ul style="list-style-type: none"> • Scanning of approximately 633,159 microfilm image/pages after microfilm frame splitting and 332,846 original book and replacement pages • Auto image clean-up and cropping, duplication, Photostat reversal, and manual excess border cropping as described in this SOW • Manual image enhancement of approximately 10% of all film images and 20% of all original book images • Image reduction and manual excess border removal of approximately 68,046 LDS images • 1,329,726 estimated total project images after duplication to be delivered in folders identified by book and volume number • Images will be identified by volume and page • All images will be electronically stapled as multi-page TIFF documents and indexed as specified • 730,850 estimated instruments after stapling 	
<p>Microfilm and Book Scanning and Indexing Services:</p> <ul style="list-style-type: none"> • Scanning of an estimated 633,159 microfilm images after 2-up splitting at \$0.155 per image • Scanning of an estimated 332,846 book images at \$0.288 per image • Processing of an estimated 68,046 LDS images at \$0.06 per image • Stapling and partial indexing of an approximately 294,078 images after duplication of run-on pages, representing an estimated 213,026 instruments at \$0.2075 per keyed instrument • Stapling and full indexing of an approximately 1,035,648 images after duplication of run-on pages, representing an estimated 517,824 instruments at \$1.4835 per keyed instrument • Full indexing price is estimated based on typed documents <p>Actual billing will be based on the actual number of images and instruments processed.</p> <p>On-site scanning cost includes \$6,000.00 for travel and labor based on an assumption of six days with 24-hour access per day. Additional days as part of the same trip are \$500.00 per day.</p>	<p style="text-align: right;">\$98,139.65</p> <p style="text-align: right;">\$95,859.65</p> <p style="text-align: right;">\$4,082.76</p> <p style="text-align: right;">\$44,202.90</p> <p style="text-align: right;">\$768,191.90</p>
<p>Estimated Total Project Price</p>	<p style="text-align: right;">\$1,010,476.80</p>

BILLING

SCANNING AND IMAGE PROCESSING

Project billing for all scanning services:

Estimated number of film images for scanning after splitting	633,159
Estimated price for film scanning (\$0.155 per image)	\$98,139.65
Estimated number of book images for scanning	332,846
Estimated price for book scanning (\$0.288 per image)	\$95,859.65
Estimated number of LDS images	68,046
Estimated price for LDS image processing (\$0.06 per image)	\$4,082.76

Billing will be 75% of the batch due upon delivery – balance (25%) upon acceptance of batch. Image duplication and stapling will be performed as part of indexing services.

INSTRUMENT INDEXING

Project billing for partial indexing:

Estimated number of images for partial indexing	294,078
Estimated number of instruments for partial indexing	213,026
Estimated price for indexing (\$0.2075 per keyed instrument)	\$44,202.90

Billing milestones for Pilot Phase for partial indexing (based on assumptions above):

Pilot Phase delivery (75% value of an estimated 21,303 instruments at \$0.2075 per keyed instrument)	\$3,315.28
Pilot Phase acceptance (25% value of an estimated 21,303 instruments at \$0.2075 per keyed instrument)	\$1,105.09
Estimated balance remaining	\$39,782.53

Billing for each production batch for indexing:

Two batches

Estimated 95,862 instruments per batch at \$0.2075 per keyed instrument
75% of value of batch due upon delivery – balance (25%) upon acceptance of batch

Note – Cost for minimal indexing of handwritten volumes/instruments is included in instrument indexing fee.

Project billing for full indexing:

Estimated number of images for full indexing	1,035,648
Estimated number of instruments for full indexing	517,824
Estimated price for indexing (\$1.4835 per keyed instrument)	\$768,191.90

Billing milestones for Pilot Phase for full indexing (based on assumptions above):

Pilot Phase delivery (75% value of an estimated 51,782 instruments at \$1.4835 per keyed instrument)	\$57,613.95
Pilot Phase acceptance (25% value of an estimated 51,782 instruments at \$1.4835 per keyed instrument)	\$19,204.65
Estimated balance remaining	\$691,373.30

Billing for each production batch for indexing:

Nine batches

Estimated 51,782 instruments per batch at \$1.4835 per keyed instrument
75% of value of batch due upon delivery – balance (25%) upon acceptance of batch



Billing milestones will be broken into batches as agree upon in the planning stages of this project. Batch size and quantity of batches may vary based on budget appropriation and County preference.

PROJECT BUDGETING

As described under "Billing", the project calls for delivery and acceptance in monthly batches. Project delivery will start with film and book scanning in the first year followed by phased indexing of partial indexed documents and then full indexed documents over several years as budget is appropriated by the County. The County's budget year runs from October through September. For the start of the 2015 budget year beginning October 1, 2014, a total of \$ 256,000 will be available with another \$ 292,000 expected to accumulate throughout the 2015 budget year. For the 2016 budget year starting October 1, 2015 and for each subsequent budget year, written notification by the Tom Green County Clerk will be required to confirm the budget available. Billing for TRTA Gov services performed during the 2015 budget year and during any succeeding budget year must not exceed the budget authorization in the appropriate budget year. For planning purposes, the County has indicated that the fund used to support the budget for this project accumulates at the rate of approximately \$ 200,000 per year.

ATTACHMENT 1 – AGREEMENT TO SOW

STATEMENT OF WORK AGREED UPON AND ACCEPTED

We, the undersigned, accept this document as a stable work product to be used in the delivery of the project described herein. Any deviation from this Statement of Work is to be handled through TRTA Gov's Change Management Process.

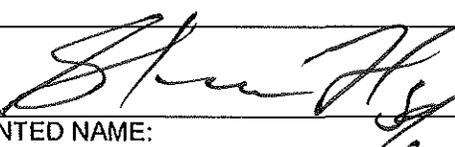
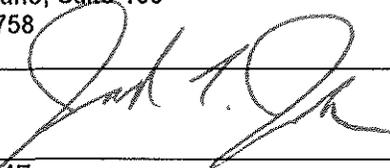
This Statement of Work will confirm all requests for professional services as outlined and at the prices indicated. This will be an addendum to any existing agreement between the County and TRTA Gov, and all the terms and conditions of that agreement(s) will pertain.

The total estimated price for microfilm and book scanning and indexing is **\$1,010,476.80**. Billing will be based on the actual number of images and instruments processed and delivered during the project.

The entirety all digital images and indexes created during this project are the exclusive property of Tom Green County, Texas. TRTA Gov will not retain a copy of, sell, or give away any digital images or indexes processed for the project described in this SOW.

This agreement is not effective until executed by both parties.

SIGNATURES

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY: 	BY: 
PRINTED NAME: Stephen C. Floyd	PRINTED NAME: Joseph Jackson
TITLE: County Judge	TITLE: Managing Director, Government
DATE: 3-17-15	DATE: March 30, 2015

ATTACHMENT 2 – ABBREVIATIONS AND DEFINITIONS

The following definitions are employed in this Statement of Work:

- Batch - A specific volume of images/pages identified as a single delivery submitted for review and acceptance
- Bi-tonal – black and white (see .tiff)
- County – Tom Green County, Texas
- Grayscale – 256 shades of gray
- Indexing – Data entry
- Indexes – Data created from the act of data entry
- Instrument (sometimes referred to as a document) - A single, complete official county record or document; an instrument can be comprised of one or many images/pages
- Image – A single image created from a single page from an instrument/document
- Page – A single piece of paper (and/or digital image) within an instrument/document
- Pilot Phase – A smaller subset of the whole of the volume of images/pages used as a proof of concept for both the scanning and indexing phases of this project
- PM – Project Manager
- SOW – Statement of Work
- Stapling (pagination) – The process of identifying and connecting the first and last digital image/page of each instrument
- .tiff - Acronym for tagged image file format (this is very standard 20:1 compression image type compatible with both PC's and Mac's); .tiff images are bi-tonal
- USB - Acronym for Universal Serial Bus

ATTACHMENT 3 – AGREEMENTS TO BUDGET

AGREEMENT TO BUDGET FOR BUDGET YEAR _____

Budgeted Amount

The County confirms that \$_____ has been added to the budget for Statement of Work TX1222814TGC as of October 1, 201____. During the County's October 1, 201____ September 30, 201____ fiscal year, TRTA Gov may invoice up to this additional amount for work that has been delivered and accepted by the County.

Signatures

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ATTACHMENT 4 – ACCEPTANCE FORMS

ACCEPTANCE FORM 1 – SCANNING BATCH DELIVERY AND FINAL ACCEPTANCE CRITERIA BATCH DELIVERY¹ CRITERIA – BATCH NO. _____

Purpose

Review and acceptance of microfilm, and book scanning, LDS image processing and image enhancement services as described in the SOW.

Measurements / Process

- TRTA Gov has scanned the microfilm designated for this project batch (YES ___ NO ___)
- TRTA Gov has scanned the books designated for this project batch (YES ___ NO ___)
- TRTA Gov has processed the LDS images designated for this project batch (YES ___ NO ___)
- TRTA Gov has processed all digital images for this batch with requested image clean-up as specified in this SOW.
- TRTA Gov has provided the County with a portable media containing all designated processed digital images.
- The County will start the thirty-calendar-day review and verification of these images for this batch.
- The County will document all errors discovered within the thirty-calendar-day review period using the provided Data Audit Report template.

Outputs

- TRTA Gov has delivered this batch of scanned digital images.
- TRTA Gov has delivered the production reports for this batch.
- TRTA Gov will resolve/remediate any errors that are submitted by the County within the thirty-calendar-day review period.

Was this the last batch of images for this project? YES NO

There were _____ images scanned and delivered for this batch.

The County response period for this acceptance form is ten (10) business days. After that time, this acceptance form will be considered accepted and ready for any billing unless otherwise documented in a formal response to TRTA Gov with detailed rationale for rejecting this form. Rejection of an acceptance form will result in immediate escalation and halt the deliverables for further review.

Signatures

By signing the following line of this Batch Delivery and Final Acceptance document, the County confirms receipt of this batch.

The County agrees to be billed 75% of the value of this batch (_____ images x \$ _____ per image x .75 =

\$ _____) and will start the review and feedback process using the provided Data Audit Report template.

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 1 (continued)

BATCH FINAL ACCEPTANCE² CRITERIA – BATCH NO. _____

By signing the following line of the Batch Delivery and Final Acceptance document, the County acknowledges the completion of the thirty-calendar-day review process and confirms final acceptance of this batch for this project. TRTA Gov has remediated all errors submitted by the County for this batch. The County agrees to be billed the final 25% of this value of this batch (_____ images x \$_____ per image x .25= \$_____).

Signatures

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 2 – INDEXING SERVICES PILOT PHASE DELIVERY ACCEPTANCE CRITERIA

Purpose

Full and partial indexing services for microfilm and replacement book scanned documents.

Measurements / Process

- TRTA Gov has provided the requested indexing for the Pilot Phase images.
- TRTA Gov has loaded the images/instruments and indexes described in this SOW as the Pilot Phase.
- The County will start the thirty-calendar-day review and verification of these images/instruments.
- The County will document all errors discovered within the thirty-calendar-day review period using the provided Data Audit Report template.

Outputs

- TRTA Gov has delivered and loaded the Pilot Phase images into the County's review server.
- TRTA Gov has delivered the production reports for the Pilot.
- TRTA Gov has supplied the Data Audit Report template for the County error submittal.
- TRTA Gov will remediate all submitted errors within ten business days.

There were _____ partial index and _____ full index instruments delivered for the Pilot Phase.

The County response period for this acceptance form is ten (10) business days. After that time, this acceptance form will be considered accepted and ready for any billing unless otherwise documented in a formal response to TRTA Gov with detailed rationale for rejecting this form. Rejection of an acceptance form will result in immediate escalation and halt the deliverables for further review.

Signatures

By signing this Pilot Phase Delivery Acceptance document, the County agrees to start the review and feedback process using the provided Data Audit Report template. The County agrees to be billed 75% of the value of the Pilot (_____ keyed instruments x \$0.2075 per keyed partial index x .75 = \$ _____) and (_____ keyed instruments x \$1.4835 per keyed full index x .75 = \$ _____) and confirms delivery acceptance of the Pilot.

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 3 – INDEXING SERVICES PILOT PHASE FINAL ACCEPTANCE CRITERIA

Purpose

Full and partial indexing services for microfilm and replacement book scanned documents.

Measurements / Process

- TRTA Gov has provided the requested indexing for the Pilot Phase images.
- TRTA Gov has loaded the images/instruments and indexes described in this SOW as the Pilot Phase.
- The County has completed the thirty-calendar-day review and verification of these images/instruments within the Anthem/GRM Recorder conversion instance.
- The County has documented all errors discovered within the thirty-calendar-day review period using the provided Data Audit Report template.

Outputs

- TRTA Gov has delivered and loaded the Pilot Phase images/instrument indexes into the County's review server.
- TRTA Gov has delivered the production reports for the Pilot.
- TRTA Gov has remediated all submitted errors within the ten business day remediation period.

There were _____ partial index and _____ full index instruments indexed for the Pilot Phase.

The County response period for this acceptance form is ten (10) business days. After that time, this acceptance form will be considered accepted and ready for any billing unless otherwise documented in a formal response to TRTA Gov with detailed rationale for rejecting this form. Rejection of an acceptance form will result in immediate escalation and halt the deliverables for further review.

Signatures

By signing this Pilot Phase Final Acceptance document, the County agrees to be billed 25% of the value of the Pilot

(_____ keyed instruments x \$0.2075 per keyed partial index x .25 = \$_____) and (_____ keyed instruments x \$1.4835 per keyed full index x .25 = \$_____), and confirms acceptance of the Pilot, and authorizes the project to move into production processing.

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 4 –
 INDEXING SERVICES BATCH DELIVERY AND FINAL ACCEPTANCE CRITERIA
 BATCH DELIVERY¹ CRITERIA – BATCH NO. _____

Purpose

Review and acceptance of full and partial indexing services.

Measurements / Process

- TRTA Gov has provided the requested indexing for book types and volumes designated for this project.
- TRTA Gov has loaded the images/instruments and indexes described in this SOW.
- The County has completed the thirty-calendar-day review and verification of these images/instruments for this batch.
- The County has documented all errors discovered within the thirty-calendar-day review period using the provided Data Audit Report template.

Outputs

- TRTA Gov has delivered and loaded this batch of instrument indexes into the County review server.
- TRTA Gov has delivered the production reports for this batch.
- TRTA Gov will resolve/remediate any errors submitted errors by the County within the thirty-calendar-day review period.

Was this the last batch for this project? YES NO

There were _____ instruments indexed and delivered for this batch. The book type and volumes for these documents are _____.

The County response period for this acceptance form is ten (10) business days. After that time, this acceptance form will be considered accepted and ready for any billing unless otherwise documented in a formal response to TRTA Gov with detailed rationale for rejecting this form. Rejection of an acceptance form will result in immediate escalation and halt the deliverables for further review.

Signatures

By signing the following line of this Batch Delivery and Final Acceptance document, the County confirms receipt of this batch.

The County agrees to be billed 75% of the value of this batch (_____ keyed partial / full index instruments x \$ _____ per keyed instrument X .75 = \$ _____) and to start the review and feedback process using the provided Data Audit Report template.

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 4 (continued)

FINAL ACCEPTANCE² CRITERIA – BATCH NO. _____

By signing the following line of the Batch Delivery and Final Acceptance document, the County acknowledges the completion of the thirty-calendar-day review process and confirms final acceptance of this batch for this project. TRTA Gov has remediated all errors submitted by the County for this batch. The County agrees to be billed the final 25% of this value of this batch (_____ keyed partial / full index instruments x \$ _____ per keyed instrument x .25 = \$ _____).

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE:

ACCEPTANCE FORM 5 –
SCANNING, STAPLING AND INDEXING
FINAL PROJECT ACCEPTANCE CRITERIA

Purpose

Reconciliation and final acceptance of the Scanning, Stapling and Indexing project.

Measurement / Process

Microfilm and Book Scanning Services –

- TRTA Gov has scanned the microfilm designated for this project.
- TRTA Gov has processed the LDS images designated for this project.
- TRTA Gov has processed all digital images/pages for this batch with requested image clean-up as specified in this SOW.
- TRTA Gov has duplicated all images for the book types identified for stapling and indexing.
- TRTA Gov has identified the first and last page of each instrument for the book types identified for stapling and digitally stapled these images together.
- TRTA Gov has remediated/satisfied all errors/anomalies discovered.

Indexing Services –

- TRTA Gov has provided the requested scanning, image enhancement and full and partial indexing for all book types and volumes designated for this project.
- TRTA Gov has loaded the images as instruments and indexes described in this SOW.
- TRTA Gov as remediated/satisfied all errors/anomalies discovered.

Outputs

- TRTA Gov has delivered the entire project of processed images and indexes to the County.
- The County has verified the entire project of images and indexes.
- The County has identified issues (if any) and sent them to TRTA Gov for review and remediation, and TRTA Gov has completed remediation for all errors submitted.
- All instruments created for this project have been formatted for loading into the County's records management system by the software vendor.



ACCEPTANCE FORM 5 (continued)

Estimated and Actual Billing for This Project

Estimated total number of microfilm images scanned after splitting	633,159
Estimated total billing for microfilm scanning (\$0.155 per image)	\$98,139.65
Actual total number microfilm images scanned	_____
Actual total billing for microfilm image scanning (\$0.155 per image)	\$ _____
Estimated total number of book images scanned	332,846
Estimated total billing for book scanning (\$0.288 per image)	\$95,859.65
Actual total number book images scanned	_____
Actual total billing for book image scanning (\$0.288 per image)	\$ _____
Estimated total number of LDS images processed	68,046
Estimated total billing for LDS image processing (\$0.06 per image)	\$4,082.76
Actual total number LDS images processed	_____
Actual total billing for LDS image processing (\$0.06 per image)	\$ _____
Estimated total number of instruments to be partial indexed	213,026
Estimated total billing for instrument partial indexing (\$0.2075 per keyed instrument)	\$44,202.90
Actual total number instruments partial indexed	_____
Actual total billing for instruments partial indexed (\$0.2075 per keyed instrument)	\$ _____
Estimated total number of instruments to be full indexed	517,824
Estimated total billing for instrument full indexing (\$1.4835 per keyed instrument)	\$768,191.90
Actual total number instruments full indexed	_____
Actual total billing for instruments full indexed (\$1.4835 per keyed instrument)	\$ _____



ACCEPTANCE FORM 5 (continued)

The County response period for this acceptance form is ten (10) business days. After that time, this acceptance form will be considered accepted and ready for any billing unless otherwise documented in a formal response to TRTA Gov with detailed rationale for rejecting this form. Rejection of an acceptance form will result in immediate escalation and halt the deliverables for further review.

Signatures

By signing this Final Project Acceptance document, the County and TRTA Gov agree that this project is complete.

Tom Green County 124 West Beauregard Avenue San Angelo, TX 76903-5835	TRTA Gov 1807 Braker Lane, Suite 400 Austin, TX 78758
BY:	BY:
PRINTED NAME:	PRINTED NAME:
TITLE:	TITLE:
DATE:	DATE: