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# Title Guaranty of Hawaii

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## DLNR Bureau of Conveyances

*A Proposal To Replace the Land Court  
System and Regular Automated Tracking  
System for the Department of Land and  
Natural Resources, Bureau of  
Conveyances*

May 28, 1999

401023

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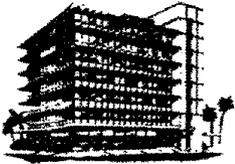
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## SECTION I, PROPOSAL AND TRANSMITTAL LETTERS

Per the instructions contained in RFP ICS-FY-99-052, Section 2.9.2, Offeror's Letter, a copy of the Transmittal/Offeror's Letter and the Subcontractor's Statement are included in this section.

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# TITLE GUARANTY OF HAWAII

INCORPORATED

235 QUEEN STREET • P.O. BOX 3084 • HONOLULU, HAWAII 96802 • TELEPHONE 533-6261

May 21, 1999

Mr. Lester M. Nakamura, Administrator  
Information and Communication Services Division  
Department of Accounting and General Services  
1151 Punchbowl Street, Room B10  
Honolulu, HI 96813

SUBJECT: Proposal/Transmittal Letter

Dear Mr. Nakamura:

The undersigned has carefully read and understands RFP No. ICS-FY-99-52 and hereby proposes, if selected, to furnish and deliver all items stated in this Proposal.

Any general questions which the Information and Communication Services Division or the State of Hawaii may have regarding this proposal should be directed to:

Mr. Michael A. Pietsch  
President  
Title Guaranty of Hawaii, Inc.  
235 Queen Street  
Honolulu, Hawaii 96813  
Telephone: 521-0259  
Facsimile : 532-3160

Questions of a technical nature may be directed to:

Ms. Debra Pyrek  
Vice President  
Title Guaranty of Hawaii, Inc.  
235 Queen Street  
Honolulu, Hawaii 96813  
Telephone: 533-5824  
Facsimile: 532-3141

The undersigned further understands and agrees that:

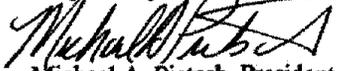
1. All addenda to this RFP have been received (3) and are understood.
2. The undersigned is a corporation which is registered with the Business Registration Division of the State of Hawaii Department of Commerce and Consumer Affairs to do business in the State of Hawaii; and has a State of Hawaii General Excise Tax License.
3. Per instructions, a statement from our proposed subcontractor is appended to the Transmittal Letter.

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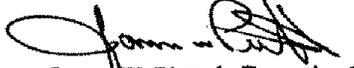


4. It is understood that the State of Hawaii reserves the right to reject any and all Proposals and to waive any defects, when in the State's opinion, such rejection and waiver may be made in the best interest of the State.
5. By submitting this proposal, the undersigned is declaring that the proposal is not in violation of Section 84-15, Hawaii Revised Statutes, concerning prohibited State contracts and that the undersigned is certifying that this proposal was arrived independently, without consultation, communication, or agreement with any other Offeror or competitor. No attempt was made or will be made by the undersigned to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
6. If awarded the Contract, any services performed must be performed in accordance with Section 103D, Hawaii Revised Statutes.
7. This proposal contains assumptions and constraints which have not been approved in advance by the State of Hawaii.
8. The undersigned acknowledges that the entire RFP has been read and understood and agrees to be bound by its terms and conditions.
9. Per instructions, the undersigned affirms that the proposal and prices in the proposal are firm and shall remain so throughout the contract period.

Respectfully Submitted,

  
Michael A. Pietsch, President

Date: 5/21/99

  
James W. Pietsch, Executive Vice President  
Title Guaranty of Hawaii, Inc.  
235 Queen Street  
Honolulu, HI 96813

Date: 5/21/99

Hawaii General Excise Tax No.: 10005663

Type of Organization:

- Individual
- Joint Venture
- Partnership
- Corporation

Federal ID No. 99-0105031

State of Incorporation:

- Hawaii
- Other

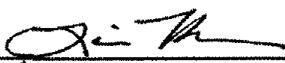
Attachments

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I hereby certify that at a meeting of the Board of Directors of TITLE GUARANTY OF HAWAII, INC., a Hawaii corporation, held on May 12, 1999, the following resolution was adopted:

"RESOLVED, that any two of the President, Executive Vice Presidents and Secretary be, and they hereby are, fully authorized and empowered to execute any and all documents necessary to enter into a contract with the State of Hawaii, Department of Accounting and General Services, Information and Communication Services Division, in connection with the State's implementation of a replacement Land Court and regular automated tracking system (RFP No. ICS-FY-99-052, as amended by Addendum 1)."

DATED: Honolulu, Hawaii; May 12, 1999.

  
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Lois Kawano  
Assistant Secretary

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**J.W. LOO & ASSOCIATES**  
Management Consultants

Post Office Box 22205  
Honolulu, Hawaii 96823  
Telephone: (808) 528-7176  
Fax: (808) 523-8543  
Email: jwia@aloha.net

May 20, 1999

Mr. Lester M. Nakamura, Administrator  
Information and Communication Services Division  
Department of Accounting and General Services  
1151 Punchbowl Street, Room B10  
Honolulu, HI 96813

SUBJECT: Subcontractor's Statement

Dear Mr. Nakamura:

This is to inform you that J.W. Loo & Associates has reviewed the requirements as set for in *Request for Proposals (ICS-FY-99-052) To Replace the Land Court System and Regular Automated Tracking System for the Department of Land and Natural Resources, Bureau of Conveyances*. Based on our understanding of those requirements, it is our intent to enter into a subcontract arrangement with Title Guaranty of Hawaii, Incorporation (TG) to perform project management and technical support services as specified in the proposal to implement Part 2 Project tasks.

Jeffrey W. Loo dba J.W. Loo & Associates is a sole proprietorship registered to do business in the State of Hawaii. Our agreement to perform the above services as a subcontractor to TG is willingly given.

Should you have any questions in this matter, please do not hesitate to call at 528-7176.

Yours very truly,



Jeffrey W. Loo, Principal  
J.W. Loo & Associates

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**APPENDIX G**

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**ADDENDUM LOG**

The following Addenda have been issued:

<u>Addendum-id</u>	<u>Addendum Title</u>	<u>Issue Date</u>
Addendum 1	Clarifications, Reply to Offeror's Written Inquiries	May 5, 1999
Addendum 2	Reply to Offeror's Additional Written Inquiries	May 12, 1999
Addendum 3	Change to Significant Dates And Reply to (more) Offeror's Written Inquiries	May 19, 1999

End-of-log-entries.

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## SECTION II, EXECUTIVE SUMMARY

Title Guaranty of Hawaii, Incorporation (TG) is pleased to have the opportunity to offer its response to *Request for Proposals (ICS-FY-99-052) To Replace the Land Court System and Regular Automated Tracking System for the Department of Land and Natural Resources, Bureau of Conveyances*. Per the specifications contained in the Request for Proposal (RFP), it is our intent to propose our services to perform the Part 2 project tasks. We believe our proposed approach to performing the Part 2 project tasks and to deliver the ten-year span of recorded document images meets and significantly exceeds the Bureau of Conveyance (BOC) requirements as set forth in the RFP.

Our proposed approach offers significant benefits to the BOC since it will use TG's already digitized recorded document images as the basis for image files delivered to the BOC. As such, we believe we will be able to deliver recorded document images to the BOC in less time and for less cost than other prospective Offerors.

Based on our proposed work plan, we believe that we will be able to deliver the ten-year span of documents to the BOC by the scheduled end of the first project phase on March 31, 2000. And since we have already completed the labor intensive document conversion process, we will be able to focus on critical quality review tasks to ensure that recorded document images delivered to the BOC are of acceptable quality.

Finally, all of our proposed work will be performed in Hawaii by TG staff, so the BOC can be assured of local control of the project. Should any problems arise during the project and during the post conversion period, TG will be able to quickly and conveniently respond.

Our proposed approach includes the use of a dedicated, high-speed network link to transmit finished recorded document image batches to the BOC. In addition to simplifying the operational processes related to migrating such a high volume of large document image files, the BOC to TG network link offers the BOC the opportunity to acquire use of finished document images long before the BCIS and associated image storage components are implemented.

In addition to our response to perform Part 2 project tasks as specified in the RFP, our proposal also contains two outsourcing alternatives that we encourage BOC management to give serious consideration.

The *Recorded Document Image Repository, Alternative One* provides for a relatively low-cost outsource arrangement that delivers to the BOC fast access to recorded document images stored at TG. With Alternative One, the BOC would be able to redeploy a significant portion of the funds allocated for acquiring the ten-year span of recorded document and to use those funds for higher value BOC projects.

The *New Recorded Document Images, Alternative Two* provides for a low-cost outsource arrangement that delivers to the BOC an efficient document capture capability for new recorded documents. With Alternative Two, the BOC would be able to refocus its resources from implementing relatively low value document capture systems and to enhance its BCIS implementation in areas that deliver real value to BOC customers.

A description of both these two alternatives is provided in Section III, Alternatives.

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TG believes that its extensive experience in the real property title industry, its experience with performing comparable document conversion projects, and its long working relationship with the BOC makes us the ideal candidate to performing the BOC Part 2 project tasks. We are a long established Hawaii company with the capability to provide the BOC with locally based services throughout the duration of this project.

We look forward to your favorable consideration of our proposal.

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## SECTION III, PROJECT APPROACH, WORKPLAN AND SCHEDULE

### Project Approach

This section describes TG's proposed approach for performing *Part 2 Tasks for the Replacement Land Court and Regular Automated Tracking System Project*.

#### Background

The Department of Land and Natural Resources, Bureau of Conveyances (BOC) is the only state in the nation with a single state-wide recording office for real property transactions. Among its responsibilities, the BOC:

- Examines, records, indexes, and microfilms over 344,000 Regular System and Land Court documents and maps annually.
- Issues Land Court Certificates of Title.
- Certifies copies of matters of record.
- Researches UCC requests.

While stated simply, these operations are complex and leave extremely small margin for error. As a consequence, the BOC has identified computers and their associated electronic devices as critical support tools necessary for staff to perform their jobs efficiently.

The BOC currently utilizes two systems: The Regular System, a partially automated system with only the index automated, and the Land Court System (LCATS) which is fully automated. Both systems and processes are similar and include many of the same document processing requirements. The Land Court System does include additional document verification steps not required in the Regular System.

At present, the BOC has seventeen (17) personal computers that it uses in its Land Court System. These computers are standalone 350 MHz, 64-Mb memory units.

#### Project Objectives

The project objectives, as stated in *Request for Proposals (ICS-FY-99-052) To Replace the Land Court System and Regular Automated Tracking System for the Department of Land and Natural Resources, Bureau of Conveyances*, are to develop and implement a replacement Land Court and Regular Automated Tracking System for the State of Hawaii. The replacement system, hereafter referred to as the Bureau of Conveyances Integrated System (BCIS), shall be a turnkey or fully functioning and efficiently operating system with the following features:

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- Retain all of the current functions and facilities provided by the Land Court and Regular Systems.
- Retain the current ability to permit remote access by current LCATS subscribers.
- Retain the current look and feel of LCATS to minimize the operational impact of BCIS on the BOC.
- Integrate the BCIS into BOC operations without disruption to staff and customers, maintain zero data loss or reentry and minimize the complexity of data conversion to ensure data migration accuracy.
- Permit access from any Neighbor Island.
- Enable the BOC to electronically store and retrieve images of documents recorded and provide for the option to extend retrieval of these images from any Neighbor Island at a later date.
- Convert microfilmed images of documents to a format and media compatible with the new BCIS.

In addition, the completed BCIS shall have the following characteristics:

- *Efficient.* The BCIS should be designed to fit the workflow and volume of the BOC, with reasonable room for expansion.
- *Economically feasible.* The BCIS should be implemented within the State's financial, operating, economic, and technological constraints.
- *Functional.* The BCIS should be designed with techniques and technology proven to work at similar installations to the BOC.
- *Manageable and user friendly.* The BCIS allows all BOC personnel, with reasonable training, to easily and fully utilize the system.
- *Accessible, yet secure.* The BCIS addresses physical and system access security concerns at all sites and centers. It is equipped with built-in security to protect the integrity of programs and systems that require limitations on access. It allows reasonable access to those who need it.
- *Safe.* The BCIS must provide for reliable access to information stored on its hardware and the maximum amount of time the data is available to the Bureau.
- *Accurate.* The BCIS must ensure that data stored is accurate and incorporates all data elements present in the LCATS and General Index systems.

### Scope of Work

Based upon the information provided in the Request For Proposal (RFP), we understand that the BOC desires to engage the services of a qualified consultant to assist to design, develop and implement a system to enhance the current Land Court and Regular automated tracking systems operated by the Bureau.

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The tasks included in this engagement are as specified in the RFP, Section 3.10. They are summarized as follows:

- Task 1. Establish BOC network.
- Task 2. Validate the BCIS requirements.
- Task 3. Install Database/Application server hardware and software.
- Task 4. Implement imaging capability on the BOC Network.
- Task 5. Implement imaging capability to the BCIS application.
- Task 6. Enable remote access to text data.
- Task 7. Enable remote access to image data.
- Task 8. Enable public access to text data.
- Task 9. Enable public access to image data.
- Task 10. Remediate data.
- Task 11. Perform GIS requirements study.
- Task 12. Load back microfilm images.

As stated in the RFP, the tasks are grouped into two independent parts. The first part consists of Tasks 1 -Task 11. The second part consists of Task 12.

Based upon the information provided in the RFP, it is our understanding that Offerors have the option to submit proposals for both parts or only one part. It is the intent of Title Guaranty of Hawaii, Incorporated (TG) to propose the services associated with Part 2 (Task 12, Load Back Microfilm Images).

### **Approach**

Based on our understanding of the BOC, the information provided in the RFP and our discussions with BOC staff, we have developed an approach that performs the proposed Part 2 Tasks in a manner that is directly responsive to the specified scope of services for that part.

Our proposed approach to performing the Part 2 Tasks offers the following distinguishing attributes:

- *Meets and exceeds the specified BOC RFP requirements.* TG's proposal provides for the delivery of approximately two million Land Court and Regular System recorded document images in standard TIFF format, as specified in the RFP specifications. It also provides a document index database containing the document record number and TIFF file name for each document. The database will be delivered in a format that can be exported to any ANSI standard SQL database selected by BOC.

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- ***Provides most cost-effective solution for the BOC.*** TG's proposal assumes use of already digitized recorded document images contained in its corporate image repository. As a result, our approach does not include primary document conversion activities and we are able to pass the cost savings on to the BOC.
- ***Provides BOC with high quality document images in a short amount of time.*** In large microfilm conversion projects such as the BOC project, it is not uncommon for image quality to be uneven due to the high volume of frames that must be processed. Our approach provides for a quality review of recorded document delivered to the BOC.

And since we will start with already digitized recorded document images, we will be able to deliver finished document images to the BOC in a relatively short time period. We estimate that we will be able to deliver the ten years of document images to the BOC by the stipulated end of the first project phase on March 31, 2000

- ***Provides BOC with near term access to finished recorded document images.*** Our approach includes the installation of a dedicated network link for transmission of finished recorded document images to the BOC. With this link, TG will be able to transmit to the BOC document image batches as soon as they have been quality reviewed. And the batches will be incremental, thus facilitating the mass migration process.
- ***Provides BOC with the opportunity to earn revenue from the recorded documents even before the BCIS is installed.*** TG will make a browser based image viewer application available to the BOC so that it can use the network link to immediately access recorded document images stored on the TG recorded document image transfer repository. This application supports the capability to retrieve, display and print images stored in the repository.
- ***Provides a safe alternative to transporting BOC microfilm to a remote site.*** TG has both digitized and microfilm copies of the recorded documents that are to be delivered to the BOC. TG will not have to utilize source recorded documents or microfilm from the BOC. As a result, the BOC will be able to minimize its risks related to loss, damage, or unauthorized duplication to its recorded document microfilm during transport to and use at a remote vendor site.
- ***Provides local support capabilities to BOC to resolve post conversion issues.*** Since TG is a locally based company, we will be able to easily address and resolve potential issues that may arise during the post image conversion and loading period. Should there be problems with the quality of delivered document images, TG will be able to easily resolve them here without need to resend source documents to a remote location for rescans.
- ***Minimizes operational impacts to the BOC.*** Since TG will not require use of BOC microfilm records, the BOC can be assured that it has full access to these records for copying purposes throughout the project period. Additional, the BOC will be able to eliminate the need to create additional operational steps related to tracking microfilm reels loaned to the Part 2 Project vendor.

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## Work Plan

This section describes TG's proposed work plan for performing *Part 2 Tasks for the Replacement Land Court and Regular Automated Tracking System Project*.

### Perform Project Management

This is the logical first phase of the project. The BOC Project Manager and TG Project Leader are responsible for organizing the project team and finalizing the detailed project work plan.

The detailed project work plan will identify project tasks, assigned resources, project milestones, deliverables, and deliverable submittal dates. It will also include tasks to address defined integration issues to ensure that Part 1 and Part 2 tasks are executed as proposed and to ensure that there is adequate coordination between TG and the selected Part 1 vendor.

Project management tasks are also included in this project phase. To ensure that the BOC is continuously involved in the project and that the project is completed as mutually agreed, regular bi-weekly status meetings with the BOC Project Manager will be scheduled throughout the project.

Project management reports including project schedules, deliverables status, and management issues will be provided as part of the project management tasks. Depending on available BOC capabilities, we can deliver ongoing project management information via email or website to reduce the need for onsite meetings.

### Develop Approved Project Work Plan

- Review Part 1 Team Proposed Solution
- Identify New and Modified BOC Requirements
- Identify Scope and Implementation Issues
- Assess Impact on Part 2 Implementation
- Develop Detailed Project Work Plan
- Present Detailed Project Work Plan
- Perform Mutually Agreed Modifications
- Negotiate Fees for Modified Activities
- Approve Final Project Work Plan

### Perform Project Management Activities

- Develop Management Reports and Processes
- Implement Project Team Training
- Monitor Progress on Deliverables
- Monitor and Resolve Project Issues

### Implement Project Status Meetings

- Develop Project Status Reports
- Attend Project Status Meetings

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## **Implement Backfile Review Preparation**

This project phase sets up operation processes and systems that support the preparation of recorded documents to be transmitted to the BOC as the Part 2 deliverable. The design of operation processes and systems defined in this project phase assumes that recorded document images currently existing in the TG image repository will be the primary source of document images to be supplied to the BOC.

The operation processes will include procedures to quality review selected document images to ensure that they are complete and meet specified image quality standards. Specific tasks will be included to resolve instances of missing documents, missing document pages, and poor image quality.

This project phase also implements the system environment that will support the quality review process. This includes implementation of the primary document index database and the image repository. The latter will be used to retain finished recorded document images pending transmission to the BOC.

Lastly, this project phase includes performing tests to ensure that defined processes and systems work satisfactorily and are capable of processing document images in a manner that meets TG output and quality performance benchmarks.

### **Develop Document Review Process**

- Define Document Review Tasks and Procedures
- Define Missing Document Scan Tasks and Procedures

### **Develop Document Review System Environment**

- Develop Document Index Transfer Database
- Implement Document Image Transfer Repository

### **Perform Document Review Workstation Preparation**

- Define Document Review Workstation Requirements
- Procure Required Hardware, Software, Equipment, and Supplies
- Install Required Hardware, Software and Equipment

### **Perform Backfile Review Tests**

- Perform Hardware and Software Tests
- Perform Processing Integrity Tests
- Perform Processing Volume Tests

### **Perform Management Assessment**

- Assess Document Review Processes
- Approve Document Review Processes

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## **Implement Backfile Review**

This project phase implements specified quality review activities for document images selected for transmission to the BOC. Document images available for selection by the BOC include recorded documents for Land Court and Regular system real property transactions beginning from January 1987.

In the quality review process, the recorded document image set selected by the BOC will be reviewed for completeness. Document record number lists will be validated against available BOC master files to ensure that an entry exists for each recorded document processed by the BOC during the selected time period.

Recorded document image files will then be sampled and reviewed to ensure that there are no missing pages and that pages meet specified image quality standards. Document and page rescans will be performed as appropriate.

Finished document images will be loaded into the TG document image transfer repository. Transmission to the BOC of finished recorded document images will be according to a mutually agreed upon batch schedule. To facilitate BOC access to the finished recorded document images, TG will provide specified quantities of a browser based image viewer that can be used to retrieve, display and print finished recorded document images stored in the TG document image transfer repository.

### **Perform Document Image Selection**

- Select Documents for Each Time Period Batch
- Populate Document Index Transfer Database for Time Periods
- Develop Documents Record No. List for Defined Time Periods
- Perform Document Records No. Validation with BOC
- Confirm Final Document Records Total

### **Perform Document Integrity Validation Activities**

- Confirm Document Image Files for Each Listed Document Record No.
- Perform Microfilm Scans to Capture Missing Document Images
- Update Document Database with New File Information
- Resolve Duplicate Record and Record No. Issues

### **Perform Document Quality Assurance Activities**

- Confirm Image Quality
- Perform Microfilm Scans to Replace Unacceptable Images
- Update Document Database with New File Information

## **Perform Preliminary Migration Activities**

This project phase sets up the processes and systems that will be used to transmit finished recorded document images to the BOC.

We propose that a direct telecommunications link between TG and the BOC will be installed to transport finished document images to the BOC. The network link will also be available to the BOC to access finished recorded document images stored on the TG document image transfer repository while the BCIS is being developed.

Activities will also be implemented to identify potential migration issues and to define processes to ensure that the migration of finished recorded document images to the BOC

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is performed in a manner that is most efficient and least intrusive to BOC daily operations.

#### **Implement Document Image Transport System**

- Review BCIS Imaging on Network Specifications (Task 4)
- Review BCIS Imaging Specifications (Task 5)
- Review BCIS Target Image Server
- Coordinate Network Link Install to BOC Image Server
- Perform Preliminary Tests
- Perform Corrective Actions

#### **Perform Document Image Migration Planning**

- Identify BOC/TG Operations Issues
- Define Batch Transmission Protocols and Specifications
- Define Document Image Batches
- Develop Document Image Migration Checklists

#### **Perform Document Image Migration**

This project phase accomplishes the migration of finished recorded document images from TG to the BOC. It includes quality review checks to ensure the integrity of transmitted images.

This project phase also includes prescribed acceptance test activities for Part 2 deliverables.

#### **Implement Document Image Migration**

- Select Defined Document Image Batches
- Execute Image Transmission According to Batch Schedule
- Perform Quality Review Checks

#### **Perform Acceptance Tests**

- Negotiate Acceptance Test Criteria
- Monitor BOC Random Sampling Activities
- Assess Identified Defects
- Perform Agreed Upon Defect Resolution Activities

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## Project Schedule

This section provides a preliminary project schedule based on the significant dates defined in the RFP and our proposed work plan. Start and end dates are defined for each major project phase and activity.

Our proposed project schedules assumes the following:

- The BOC project starts on time and follows the schedule detailed in the RFP.
- The BOC and TG experience no Year 2000 problems that causes disruptions beyond the control of either party.
- TG project staff will be provided timely and reasonable access to BOC documents and information required for specified project activities and deliverables.
- The BOC Project Manager and designated staff will provide timely review and feedback on specified project deliverables.
- The completion of Part 2 activities, as proposed, are not made contingent upon final completion of Part 1 deliverables.

ACTIVITY DESCRIPTION	START DATE	END DATE
<b>PERFORM PROJECT MANAGEMENT</b>	August 2, 1999	March 31, 2000
Develop Approved Project Work Plan	August 2, 1999	September 1, 1999
Perform Project Management Activities	August 9, 1999	March 31, 2000
Implement Project Status Meetings	September 1, 1999	March 31, 2000
<b>IMPLEMENT BACKFILE REVIEW PREPARATION</b>	August 9, 1999	August 27, 1999
Develop Document Review Process	August 23, 1999	August 27, 1999
Develop Document Review System Environment	August 23, 1999	August 27, 1999
Perform Document Review Workstation Preparation	August 9, 1999	August 20, 1999
Perform Backfile Review Tests	August 23, 1999	August 27, 1999
Perform Management Assessment	August 23, 1999	August 27, 1999
<b>IMPLEMENT BACKFILE REVIEW</b>	August 23, 1999	March 31, 2000
Perform Document Image Selection	August 23, 1999	August 31, 1999
Perform Document Integrity Validation Activities	September 1, 1999	March 17, 2000
Perform Document Quality Assurance Activities	September 1, 1999	March 17, 2000
<b>PERFORM PRELIMINARY MIGRATION ACTIVITIES</b>	August 23, 1999	September 1, 1999
Implement Document Image Transport System	August 23, 1999	September 1, 1999
Perform Document Image Migration Planning	August 23, 1999	August 27, 1999
<b>PERFORM DOCUMENT IMAGE MIGRATION</b>	August 23, 1999	March 31, 2000
Implement Document Image Migration	September 1, 1999	March 31, 2000
Perform Acceptance Tests	August 23, 1999	March 31, 2000

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## Alternatives

This section provides an overview of two alternatives that extend our proposal to perform *Part 2 Tasks for the Replacement Land Court and Regular Automated Tracking System Project*. Based on our understanding of the BOC requirements and our extensive experience with implementing a comparable system and document conversion project, we believe the two alternatives present the BOC with very significant near term and potential long term value. We encourage the BOC to seriously consider the opportunities that our proposed alternatives provide.

The *Recorded Document Image Repository, Alternative One* provides for a relatively low-cost outsource arrangement that delivers to the BOC fast access to recorded document images stored at TG. With Alternative One, the BOC would be able to redeploy a significant portion of the funds allocated for acquiring the ten-year span of recorded document and to use those funds for higher value BOC projects.

The *New Recorded Document Images, Alternative Two* provides for a low-cost outsource arrangement that delivers to the BOC an efficient document capture capability for new recorded documents. With Alternative Two, the BOC would be able to refocus its resources from implementing relatively low value document capture systems and to enhance its BCIS implementation in areas that deliver real value to BOC customers.

The *Recorded Document Image Repository, Alternative One* and the *New Recorded Document Images, Alternative Two* have been designed as independent modules but are fashioned to be complementary to each other. Taken together, they offer BOC a superior solution for enabling access to new and archived recorded documents at a cost effective price.

TG is very willing to discuss modifications to its BOC Part 2 Project proposal and the two alternatives to ensure that TG is able to address BOC concerns and its requirements.

### Recorded Document Image Repository, Alternative One

The *Recorded Document Image Repository, Alternative One* is a variation of our proposal to perform the BOC Part 2 Project. It provides BOC with a cost effective option to use the TG recorded document image repository on an outsource basis.

As in our proposed BOC Part 2 Project approach, we will quality review specified recorded documents for a ten year period, install a dedicated network link to the BOC, and provide a complete document index database to the BOC for upload to its BCIS database.

In Alternative One, finished recorded document images would be stored on a high capacity RAID array at TG. Using the dedicated, high-speed network link, the BOC would use the BCIS application or TG provided browser based image viewers to access the TG recorded document image repository. From its main offices and Neighbor Island offices, the BOC would be able to search, retrieve, display, print and download recorded documents from the TG recorded document image repository.

Under Alternative One, the BOC would retain the option to acquire the ten-year span of recorded documents from TG. Upon termination of the outsource agreement, TG would be prepared to provide the BOC with the ten-year span of recorded document images for a mutually agreed upon price. At termination, TG would execute the specified tasks in its BOC Part 2 Project work plan related to image migration and initiate transmission of recorded documents to the BOC over the network link.

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Based on our understanding of the BOC's requirements and our experience derived from many years in the title insurance business in Hawaii, we believe the *Recorded Document Image Repository, Alternative One* offers the following benefits to the BOC:

- *Offers the BOC full access to necessary recorded documents without the conversion and operations costs.* With Alternative One, the BOC has the option to delay or eliminate proposed costs to digitally convert microfilm and to manage a high capacity image server/optical jukebox system environment. We believe that with Alternative One, the BOC has an opportunity to save \$200,000 - \$400,000 in document conversion costs and approximately \$250,000 - \$400,000 in image storage equipment acquisition and installation costs. Additional operational costs and staff costs savings could also be derived since the BOC would not require operations staff to maintain the image server/optical jukebox systems.
- *Offers BOC with near term access to necessary recorded documents.* With Alternative One, TG can offer BOC near term access to the ten-year span of recorded documents that it requires. Once recorded document images have been quality reviewed, they will be available on the TG recorded document image repository for access by BOC offices, both on Oahu and the Neighbor Islands. Under Alternative One, the BOC will not have to wait for final completion of the BCIS before it is able to access recorded document images.
- *Offers BOC a high speed documents retrieval option with off-site backup safeguards.* With recorded documents stored on the TG RAID array based image repository, the BOC will have a superior image delivery platform for accessing recorded documents. A RAID based storage system is the optimal solution for retrieval of large image files and transmission over the Internet and over the State HAWAIIAN Network. And the BOC is assured of having adequate off-site backups in case of systems failure and disruptions. In addition to safeguards built into the RAID array device, TG maintains both CD based image duplicates and microfilm copies of its recorded document images.

### **New Recorded Documents Images, Alternative Two**

The *Recorded Document Images, Alternative Two* is an extension of our proposal to perform the BOC Part 2 Project and Alternative One. It provides BOC with a cost effective option to access new recorded documents stored in the TG recorded document image repository on an outsource basis.

Under Alternative Two, TG would perform document image capture tasks similar to those currently offered to the BOC. On a daily basis, TG would scan new recorded documents, perform image quality review, and enter document index data. The new recorded document images would subsequently be loaded to a designated BOC image server and to the TG recorded document image repository.

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In Alternative Two, the BOC would have the option of retrieving new recorded document images from its own image server or the TG recorded document image repository.

We believe the *Recorded Document Images, Alternative Two* offers the BOC the following benefits:

- ***Offers the BOC full access to new recorded documents without the conversion and operations costs.*** With Alternative Two, the BOC has the option to delay or eliminate proposed costs to digitally convert new recorded documents. We believe that with Alternative Two, the BOC has an opportunity to save \$100,000 - \$200,000 in document capture software costs and approximately \$100,000 in document scanning and image storage equipment costs. Additional operational costs and staff costs savings could also be derived since the BOC would not require operations staff to perform document preparation and capture tasks.
- ***Offers BOC with near term access to necessary recorded documents.*** With Alternative Two, TG can offer BOC near term access to new recorded documents. Once new recorded document images have been loaded to the BOC image server and the TG recorded document image repository they will be available for access by BOC offices, both on Oahu and the Neighbor Islands. Under Alternative Two, the BOC will not have to wait for final completion of the BCIS before it is able to access new recorded document images.

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## SECTION IV, ORGANIZATION AND STAFFING

This section describes the project organization and the roles of the respective project team members. Our proposed project organization has been developed based on the requirements outlined by the BOC for performing *Part 2 Tasks for the Replacement Land Court and Regular Automated Tracking System Project*. It reflects project team units that optimally match individual talents and expertise with the project tasks and responsibilities.

### Organization Chart

An organization chart of our proposed project team is provided on the following page. All work to be performed by our proposed project team will be done from TG office locations in Honolulu.

### Position Descriptions

This section provides a general description of the positions included in the project organization chart. It also includes the names of our proposed team managers.

#### BOC Project Manager

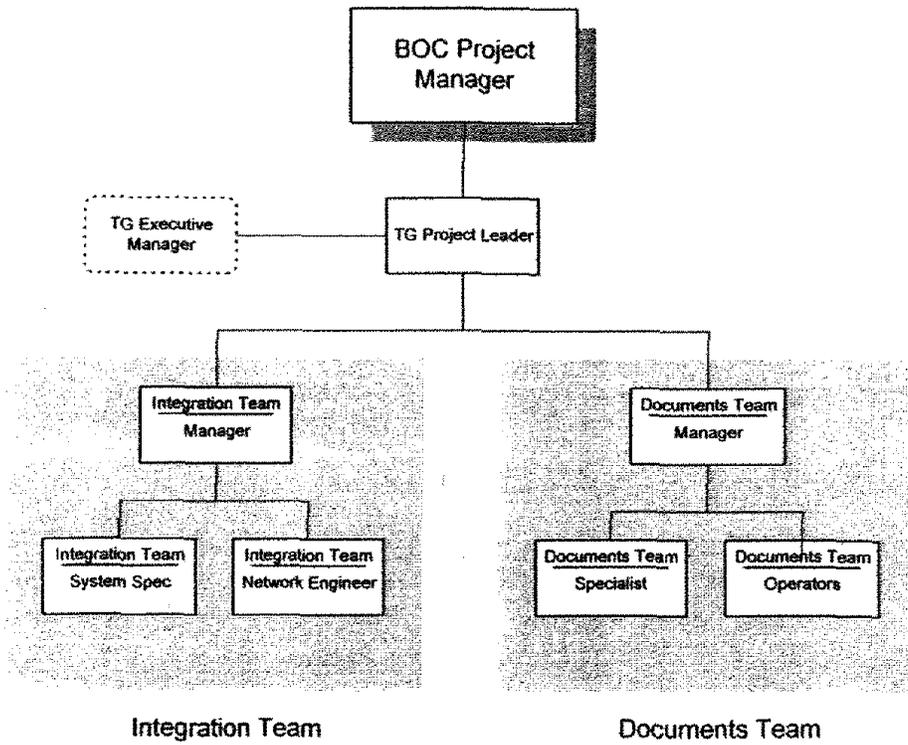
The BOC Project Manager will serve as the designated BOC contact and will work directly with the TG project team. S/he will be the primary point of interaction between the project team and the BOC for administrative and reporting needs.

The BOC Project Managers responsibilities shall include:

- Cooperating with TG project team members in obtaining information as may be required for all project tasks.
- Monitoring the project plan and working with the TG Project Leader to remedy any scheduling issues.
- Scheduling appropriate reviews of project deliverables between the BOC and the TG project team.
- Ensuring that the department's reviews and approvals are provided on a timely basis.

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# BOC Part 2 Project Team



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**TG Executive Manager**

TG Executive Manager will be in overall charge of the Part 2 Project for TG. She will be responsible for providing general supervision of the project, reviewing project matters relating to scope, budget, and billing policy, and reviewing final project deliverables to ensure that they meet TG and BOC quality standards.

The TG Executive Manager for this project will be *Debra Pyrek*. At TG, Debra is Vice President, Corporate Information Systems.

**TG Project Leader**

The TG Project Leader will be responsible to the BOC and to TG for the operational supervision of the Part 2 project. He will work closely with the BOC Project Manager to manage all aspects of the implementation project including:

- Delivering the project within the time frame and budget proposed;
- Identifying and resolving issues that may complicate the successful project completion;
- Ensuring that all project team members meet their responsibilities and requirements;
- Ensuring that the project staff conform to all technical standards to the project; and,
- Allocating resources and controlling project activities to ensure that the project objectives are met and specified project deliverables are successfully completed.

The TG Project Leader will report to the BOC Project Manager and the TG Executive Manager on a regular basis to discuss the level of service quality and overall project status.

*Jeffrey Loo* will serve as the Project Leader. As Principal consultant of J.W. Loo & Associates, Jeffrey has many years of experience in project management, as well as a comprehensive background in system development, organization development, and general Hawaii State government operations..

**The Integration Team**

The Integration Team will be responsible for the tasks associated with implementing the systems supporting the quality review and transmission of recorded document images. Members of this team have been selected for their specialized experience in operational systems and network implementations.

The Integration Team will be managed by *Gerald Opedal*. At TG, Gerald is a Vice President in the Information Systems Department. Additional members of the Integration Team shall include a System Specialist and a Network Engineer. *Steve Tomlinson* will be

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the System Specialist on our project team. At TG, Steve is a System Engineer in the Information Systems Department.

#### The Documents Team

The Documents Team will be responsible for the tasks associated with implementing the quality review of recorded document images. Members of this team have been selected for their specialized expertise in high volume document imaging projects.

The Documents Team will be managed by *Carlos Buhk*. At TG, Carlos is Director, Record Management. Additional members of the Documents Team shall include a Documents Specialist and approximately 6 Documents Operators.

## Contact Information

This section includes required contact information for our proposed project team managers.

NAME	TITLE	PHONE	FAX
Debra Pyrek	Vice President, Information System Department	533-6624	532-3141
Gerald Opedal	Vice President, Information System Department	521-0251	532-3141
Steven B. Tomlinson	System Engineer, Information System Department	530-7746	532-3141
Carlos Buhk	Director, Record Management	533-5803	533-2271
Jeffrey Loo	Principal, J.W. Loo & Associates	528-7176	523-8543

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## SECTION V, OFFEROR BACKGROUND AND EXPERIENCE

### Title Guaranty of Hawaii, Incorporated

Title Guaranty of Hawaii, Incorporated (TG) will serve as the prime contractor in this proposal to perform *Part 2 Tasks for the Replacement Land Court and Regular Automated Tracking System Project*.

TG has no pending litigation at this time.

#### Company Description

Title Guaranty of Hawaii, Incorporated (TG) is the oldest and largest kamaaina title insurance company in the State of Hawaii. Our roots trace back to 1896, with the formation of Makinney and Company; and to 1946, with the formation of Hawaiian Title Company. In 1952, Makinney and Company merged with Hawaiian Title Company, Limited to form Title Guaranty of Hawaii, Incorporated.

TG is located at 235 Queen Street in the Title Guaranty Building. Our sister company, Title Guaranty Escrow Services, Inc. has its main downtown branch in the same building and also has 15 additional branch offices located throughout the islands. There are seven escrow branches on Oahu, three on the Big Island, four on Maui and one on Kauai. Our neighbor island escrow branches provide assistance to the title company in obtaining real property tax information and court proceedings to support our title research.

TG is headed by Michael Pietsch, President, and employs over 200 people. Our title operation is supported by administrative departments responsible for our in-house title plant, records management system, and information systems. Our Information Systems department is staffed by fifteen people, which include Wang VS/UNIX Programmers, Software Engineers, Hardware Technicians, and Technical Operations personnel.

TG is the only title company in the State of Hawaii with a complete in-house title plant. Our title plant consists of copies of recorded documents and translations of early documents written in Hawaiian, dating back to the 1800's. It includes Grantor/Grantee indexes (found at the Bureau of Conveyances), court proceedings relating to real property from all circuits (found at the State Archives and Circuit Courts), and Tax Map information (found at the Real Property Assessment Division, Mapping Branch). We also maintain Federal District Court and Bankruptcy Court records.

In 1960 we began to maintain an internal indexing system by tax map key of all Regular system recorded documents. In 1986 TG automated this system into a computerized database. The database is updated daily for all documents recorded in both Regular and Land Court systems, and new Circuit and Federal court proceedings. Real property tax assessment information is also maintained by tax map key. Our computerized database provides on-line access to property transactions for the past twelve years.

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## **Title Guaranty of Hawaii, Related Project Experience**

This section provides descriptions of related projects performed by TG.

### **Title Guaranty of Hawaii**

Documents and Tax Maps Conversion, 1993 - Present

In 1993 our Imaging Project team worked with numerous vendors to design a system to digitize documents from microfilm. This document system includes tax maps, Land Court documents and Regular System documents (by liber/page before 1990). Our image system scans the microfilm documents, performs Optical Character Recognition (OCR) of Bureau-assigned document numbers for each document, automatically builds the document index, and allows for human verification of the index. At present, approximately 240 documents or 1,700 pages are processed into the digital library each day.

More than 21 million pages, which includes documents recorded since 1986, have been digitized. Images are currently available to 125 concurrent users within our title and escrow companies. Images are currently stored in 20 NSM jukeboxes connected to the main TG network. Documents can be retrieved in 13 seconds. Our ultimate gain in creating a digitized library of documents was realized by the integration of these images to our title research workflow and customer service. The system is currently being upgraded to convert our primary image storage subsystems from the CD jukeboxes to RAID arrays.

### **Title Guaranty of Hawaii**

Integration of Imaged Documents to Title Research, 1995

In 1995 TG designed a unique split screen system for title researchers which enables the simultaneous view of recorded documents and property transactions, while preparing the title report. The integration of our imaging system into our workflow has significantly increased productivity and capacity within the Company. Our clients have also realized significant improvement in our servicing time.

### **Title Guaranty of Hawaii**

Property Management Document Disclosure, 1996 - Present

In 1996 the State of Hawaii enacted the Condominium disclosure laws requiring specific documents to be provided to prospective buyers of condominium units. As a result, large property management companies of these projects were faced with the administrative burden of providing copies of various documents. Several management companies concluded that the process of updating and compiling up to 20 different document types for a full disclosure request required additional staffing and storage space. TG offered an alternative solution using an imaged-based document system.

TG currently provides an image-based document system for five property management companies. Our clients include Chaney Brooks & Company and Hawaiiana Management Company. Unrecorded documents (ex. Reserve Study Reports, meeting minutes, etc.) are received and scanned to our image database. TG delivers the disclosure request by compiling various recorded and unrecorded documents. A condominium disclosure packet can be prepared and packaged in less than 30 minutes due to high-speed, on-line document retrieval.

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**Title Guaranty of Hawaii****Integration of Image Documents to Title Plant, 1998**

In 1998 TG fulfilled one of its dreams . . . to create a paperless environment in its title plant. Our image project team designed a unique split-screen workflow system to enable the simultaneous view of recorded documents and data entry screens. In July 1998 we discontinued the printing of recorded documents from microfilm. Our title plant was finally relieved of handling 250 paper based documents each day.

**Title Guaranty Escrow Services****Escrow File Imaging, 1998**

In July 1998 we implemented an electronic file storage and retrieval system for our sister Company's escrow transaction files. This file scanning system is located at our record center facility in Moanalua. The system scans approximately 10,000 pages each day using a single scanner.

**J.W. Loo & Associates**

J.W. Loo & Associates will serve as a subcontractor on the BOC Part 2 Project.

J.W. Loo & Associates has no pending litigation at this time.

**Company Description**

J.W. Loo & Associates (JWLA) is a management consultant firm providing information technology and organization development consulting services to clients throughout Hawaii and the Pacific Rim. Established in 1985, J.W. Loo & Associates is a sole proprietorship headed by its principal, Jeffrey Loo.

We are versatile, consulting specialists with a clientele that includes major private sector companies, government organizations and non-profit agencies.

In assisting clients with their organization problems, JWLA takes an integrated consulting approach. We emphasize using information technology to help them improve the overall well-being of their company.

However, before applying information technology solutions, JWLA works with clients to examine their full company practices. We help them to analyze their internal processes and organization resources and make sure that they are well aligned with our clients' strategic business objectives.

One of our fundamental business principles is that we assign the best consulting talent to our client projects. Besides the expertise provided by our firm's associates, we are strategically allied with leading consulting firms in Hawaii and the Mainland and thus have access to the most qualified consultant resources available.

Over the past five years, our management consulting associates have performed successful engagements for numerous public and private sector clients with respect to the following areas:

**401052**

- **Information Technology.** We have assisted a wide range of clients with implementing information technology solutions. Specifically, we have developed system process models, defined process and data requirements, assessed system alternatives, developed system specifications and installed package systems.
- **Organization Development.** Our prior engagements have included organization reviews and analyses to assist clients with developing more effective organizational structures, work processes, and information flows. Our projects in this area have dealt with assessing operational effectiveness and efficiency in corporate and governmental operations including reviewing operating policies and procedures, management and worker practices, and service delivery methods.
- **Regulations.** We have assisted state and county agencies in determining the impact of federal regulations upon their operations, complying with these requirements, and assessing the effectiveness of the regulatory process. In addition, we have performed analyses that have assisted our clients to reduce or eliminate non-compliance sanctions. **General Studies.** We have performed research, evaluation and analysis projects in a wide range of areas including real property, economic development, vocational education, public education, demographic profiles and market trends.

### Clients Served

A partial list of J.W. Loo & Associates clients includes the following:

Amfac Distribution, Hawaii	State of Hawaii
Ashiya University (Japan)	• Department of the Attorney General
Brewer Environmental Industries	• Department of Business, Economic Development & Tourism
Fred. L. Waldron, Ltd.	• Department of Commerce and Consumer Affairs
Hawaii Community Foundation	• Department of Education
Hawaii Health Information Corporation	• Department of Hawaiian Home Lands
Hawaii Medical Association	• Department of Health
Healthcare Association of Hawaii	• Department of Transportation
Locations, Inc.	• Office of Environmental Quality Control
Monroe & Friedlander Inc.	• Office of the Governor
Monroe & Friedlander Management Inc.	• Office of the Legislative Auditor
North Hawaii Community Hospital	• University of Hawaii
Pacific Healthcare Research Institute	City & County of Honolulu
St. Francis Healthcare System of Hawaii	• Department of Transportation
Straub Clinic & Hospital	
Summit Planning	
Title Guaranty of Hawaii	

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## **J.W. Loo & Associates, Related Project Experience**

### **Office of the Attorney General,**

System Design, August 1994 - June, 1995

System Implementation, December, 1996 - 1997

For this major state agency, JWLA assisted with the development of an application and database system to support the statewide tracking of adult offenders. Our project responsibilities include performing business area analysis, designing application modules, and performing IE system methodology training. In a prior engagement, we assisted with selecting system methodologies and ICASE tools and developing the system function model for the application. Participating agencies included the police, prosecutor, judicial, and corrections related organizations in Hawaii. The system environment uses System Architect (CASE), Martin IE (methodology), Powerbuilder (system development) and Oracle 7 (RDBMS).

### **Department of Health**

System Requirements, February 1994 - January 1995

For this major state health agency, we developed system requirements and technical specifications for a statewide child immunization tracking system. This include performing needs assessments, developing design alternatives, and preparing specifications for implementation of a data repository interfaced with the major primary care provider and insurers in Hawaii. For this engagement, the AGS SDM/Structured system development methodology was used.

### **Department of Transportation**

System Requirements and Procurement, May 1993 - April 1994

For this major state transportation agency, we performed a requirements and feasibility study for imaging system applications to improve the performance of business processes in the airports operations. Both administrative and operations applications were included in the study scope. Our role included assessing user needs, defining systems requirements and specifications, assessing related network infrastructure, developing the system implementation RFP and performing project management on the system implementation. We used the AGS SDM/Structured system development methodology for this engagement.

### **Department of Health**

System Requirements and Design, January 1992 - June 1992

For this major state agency, we assisted with a project to determine strategies for improving the processing and archiving of vital health records. This project involves performing a system analysis using the SDM/Structured Small Project Methodology and developing a functional certificate processing prototype. For the functional prototype, we assisted with developing applications to integrate Wang VS image files with DEC VAX based MUMPs data indexes on a Novell LAN. For this project, we were teamed with Wang Laboratories and ISDI.

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**Office of the Governor**

Project Facilitation, March 1996 - July 1996

For this executive State agency, we performed project management assistance to support court mandated compliance activities in the child mental health program area. Our responsibilities included facilitating project planning, analyzing project alternatives, and defining project schedules and deliverables.

**Office of the Governor**

Organization Reengineering, April 1995 - June 1995

For an executive State agency, we implemented an organization reengineering analysis to identify candidate agency processes that would benefit from business process reengineering. The scope of the analysis included all Executive Branch departments. The focus of the analysis includes identifying redundant public services, overlapping functional authorities, and diffused program responsibilities.

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## SECTION VI, PRICE

Per the instructions in RFP ICS-FY-99-052, Section 2.9.4.7, Price, this section includes our proposed pricing for performing the BOC Part 2 project tasks.

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**PART 1**

Offeror declines proposing a price for PART 1

**401057**

## PART 2

This section provides a summary of our proposed price for performing the BOC Part 2 project tasks. It also contains our stated assumptions.

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## PART 2

### Cost of Work

Based on the information provided to us and our stated assumptions, our estimated price to complete the BOC Part 2 project tasks as specified in the RFP ICS-FY-99-052 are provided below. Our price estimates are exclusive of out of pocket expenses (parking, form/supplies, extra image copies) that may be incurred to complete the project. These expenses will only be incurred with prior client approval and will be billed as a reimbursable expense.

DESCRIPTION	UNITS	UNIT PRICE	PRICE
Recorded Document Images*	2,000,000	\$ 0.20	\$ 400,000
SUBTOTAL			\$ 400,000
Hawaii General Excise Tax (4.166%)			\$ 16,664
TOTAL			\$ 416,664

\*Unit Price = (\$.025/page X 8 pages/doc)

As stated, our proposed price is for a ten-year span of recorded document images that would be delivered to the BOC by March 31, 2000. Should the BOC opt to order the ten-year span of images in two five-year increments, our proposed price for *each* increment would be \$208,332 including Hawaii General Excise Tax.

### Assumptions

Our assumptions include the following:

- Our proposed fee is based on the total number of recorded document images actually delivered and accepted by the BOC. The 2,000,000 unit reference used in this price proposal is based on the total number of images estimate provided by the BOC in the RFP.

Should the actual delivered images total be more or less than the reference amount, our price will be based on a unit price of \$ .20 per document image.

- It is our understanding that a single recorded document image is equivalent to a recorded document. Our proposed price is based on documents delivered, not pages. It assumes that each recorded document image contains approximately 8 pages per document. For computation purposes, our proposed price of \$ .20 per document is based on a charge of \$ .025 per page.

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## PART 2

- Our proposed price is based on the assumption that the BOC selects a ten-year span of recorded documents with a starting period no earlier than January 1987.
- The monthly lease line charges for a single, dedicated telecommunications link installed between the BOC and TG are included in our proposed price and shall be the responsibility of TG until the scheduled end of this project phase on March 31, 2000. Thereafter, the costs for the lease line will be included in an outsource service agreement between BOC and TG or alternatively, the lease line will be terminated and removed if no agreement is entered into after March 31, 2000.
- Our proposed price is based on the assumption that we will incrementally bill for and be paid for recorded document image batches as they are transmitted and accepted by the BOC throughout the scheduled project period through March 31, 2000.
- Our proposed price is based on our assumption that acceptance of our deliverables will not be held contingent upon successful completion and acceptance of Part 1 deliverables.
- Our proposed approach includes an option for the BOC to use the TG image repository over the dedicated telecommunications link to access stored recorded document images during the duration of this project. Should the BOC be interested in exercising this option, TG is willing and prepared to discuss with the BOC a defined scope (e.g. number of users, BOC/public users, means of access) and a price for the service.

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## SECTION VII, CERTIFICATION

Per RFP ICS-FY-99-052, Section 2.9.4.8, Certification, this section includes our certification setting forth our statement of the stipulated representations.

401061



# TITLE GUARANTY OF HAWAII

INCORPORATED

235 QUEEN STREET • P.O. BOX 3084 • HONOLULU, HAWAII 96802 • TELEPHONE 533-6261

May 20, 1999

Mr. Lester M. Nakamura, Administrator  
Information and Communication Services Division  
Department of Accounting and General Services  
1151 Punchbowl Street, Room B10  
Honolulu, HI 96813

SUBJECT: Certification Letter

Dear Mr. Nakamura:

Per the instructions contained in RFP No. ICS-FY-99-52, Certification (Section 2.9.4.8), the undersigned certifies the following:

- The prices and cost data were arrived at independently, without consultation communication, or agreement with any other Offeror or competitor.
- Unless otherwise required by law, the prices and cost data that were submitted have not been knowingly disclosed by the Offeror, directly or indirectly, to any other Offeror or competitor prior to the award of the contract.
- No attempt was made or will be made by each Offeror to induce any other person or firm to submit or not to submit a price for the purpose of restricting competition.

Respectfully Submitted,

Michael A. Pietsch, President  
Title Guaranty of Hawaii, Inc.  
235 Queen Street  
Honolulu, Hawaii 96813

5/21/99

Date

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## ATTACHMENT A, STAFF RESUMES

Per RFP ICS-FY-99-052, Section 2.9.4.5, this section includes resumes for all TG team managers on our proposed project team. A list of these individuals is provided below:

NAME	STAFF TITLE	PROJECT POSITION
Debra Pyrek	Vice President, Information System Department	TG Executive Manager
Gerald Opedal	Vice President, Information System Department	Integration Team Manager
Steven B. Tomlinson	System Engineer, Information System Department	Integration Team System Specialist
Carlos Buhk	Director, Record Management	Documents Team Manager

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<b>NAME</b>	<b>Debra L. Pyrek</b>
<b>POSITION</b>	Vice President, Corporate Information Systems Title Guaranty of Hawaii, Incorporated
<b>PROFILE</b>	<p>Debra has extensive experience as a project manager, as well as hands-on programming expertise. She has technical expertise in design, implementation, testing and deployment of software applications and systems.</p> <p>She has in-depth knowledge of the following programming languages, software packages and design tools: Microsoft Visual Basic 3.0 /4.0/5.0/6.0, Structured Query Language (SQL), Relational database design using Logic Works' ERwin/ERX, Database experience using Sybase System 10 and 11, Microsoft SQL Server 4.21, 6.0, 7.0, dBASE, Microsoft Access 2.0, 7.0, 97, Microsoft SourceSafe version control software, Microsoft Office 95 and 97 (all applications), Microsoft Project, Graphical development packages including Designer, PhotoStyler, HiJaak PRO, Icon Works, Visio, Publisher's Paintbrush, and various commercial and shareware products, Internet applications (Netscape, Mosaic, MSN, Eudora), Client-server and Wide Area Network (WAN) protocols (TCP/IP, FTP), Database communications via Sybase Open Client, ODBC and DBLIB, Windows 3.x, 95, 98 and NT, UNIX, DOS, OS/2 operating systems, Autocad 12, Asymetrix' Toolbook, C programming language, WordPerfect for DOS and Windows</p>
<b>EDUCATION</b>	BS, Industrial Engineering, University of Illinois, Urbana
<b>EXPERIENCE</b>	<p><b>Title Guaranty of Hawaii, Inc., 1998 - Present</b> Vice President, Corporate Information Systems</p> <p>Department Manager responsible for all computer and information systems in use and in development at Title Guaranty of Hawaii and Title Guaranty Escrow. Manages an information systems staff of 15. Project Manager for all Imaging related systems development and implementation projects.</p> <p><b>Metro Information Services, 1997 - 1998</b> Information Systems Consultant/Staff Support Coordinator</p> <p>Assigned as Project Manager for a major long distance telephone carrier. Leading a 9-member development team in designing and implementing Customer Service and Billing systems. Systems included Visual Basic 4.0 32-bit clients running on Microsoft NT 4.0 workstations and a Sybase System 11 database running on Sun Solaris 2.5.</p>

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Processed over 1.2 million records per day in telephone call data. Performed Sybase DBA duties for the production and development environments. Responsible for the UNIX-based server. Hardware included three Sun Sparc machines, one with a disc array running Veratis Volume Management software and one remote server. Responsible for designing data replication to 3 remote sites. Responsible for data warehouse design and implementation. Served as Staff Support Coordinator for Metro, responsible for managing the development team. Duties included monthly status reports, employee reviews, technical interviews, additional staffing requirements, scheduling, time sheets, etc. Promoted to Staff Support Coordinator within 90 days of employment.

**Title Guaranty of Hawaii, Inc. 1994 - 1997**  
Systems Development Director

Managed all IS projects for both Title and Escrow departments. Duties included project prioritization, scheduling, systems analysis, technical design and implementation. Served as Information Services liaison between departments and all levels of management, including company owners. Designed and developed systems for the real estate industry. Managed a team of 6 developers responsible for creating this system. Initially built a working prototype of the system (Visual Basic 3.0, Microsoft SQL Server 4.21). Expanded concepts and skills from prototype development into building the fully developed system (Visual Basic 3.0/4.0, Microsoft SQL Server 6.0/6.5). Involved in the design of all major features of the actual system. Interfaced with consultants and vendors responsible for other project deliverables. Responsible for database design and data integrity (ERwin/ERX 2.5).

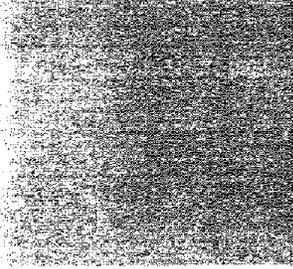
**Sargent & Lundy Engineers, Inc. 1991 - 1994**  
Instrumentation and Control Human Factors Engineer

Developed technical software applications for the power industry. Specialized in user interface design. Created software usability requirements and testing plans. Designed and implemented training courses in Human Factors Engineering for both engineering and non-technical audiences. Designed and implemented training courses in client-server software development and related technologies. Designed fossil and nuclear power plant control room layouts and associated control systems, including control panel design and distributed control systems implemented in power plants world-wide.

**Independent Contractor, 1993**  
Software/System Engineer

Created a hospital infant monitoring system. Designed monitoring methodology and defined system requirements. Developed prototype of Infant Tracking and Monitoring system. Implemented the design in the actual system that provides hospitals a means of monitoring perimeter and tamper alarms as well as infant tracking capabilities to improve hospital security.

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**Peterson/Puritan, Inc. 1990**  
**Industrial Engineer**

Developed procedures used to analyze and improve productivity and reduce costs incurred in the bottling of aerosol and liquid products. Analyzed production line and associated equipment and identified problem areas in economic terms. Resolved to implement an equipment upgrade on a single machine to significantly reduce scrap produced.

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<b>NAME</b>	Gerald Opedal
<b>POSITION</b>	Vice President, Information Systems Department Title Guaranty of Hawaii, Incorporated
<b>EDUCATION</b>	B.S., ICS, University of Hawaii, Manoa
<b>EXPERIENCE</b>	<b>Title Guaranty of Hawaii, Inc., 1987 - Present</b> Vice President, Information Systems Department  Department Manager responsible for computer and information systems projects Title Guaranty of Hawaii. Manages an information systems staff of 8.  <b>Bishop Trust, Co. Ltd.</b> Programmer/Analyst

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**NAME**

Steven B. Tomlinson

**POSITION**Software System Engineer, Corporate Information Systems  
Title Guaranty of Hawaii, Incorporated**PROFILE**

Steven has seven years experience in design, development, and implementation of custom client/server, database, imaging, and application solutions utilizing Visual Basic, SQL, and related development tools. He has demonstrated expertise in developing Internet/Intranet applications utilizing HTML, JavaScript, VBScript, Active Server, and ActiveX technologies. Familiar and comfortable working with the latest computer technologies and tools.

He has in-depth knowledge of the following programming languages, software packages and design tools: Windows (3.0, 3.1, 3.11, 95, NT, NT Workstation), Visual Basic 3.0, 4.0, 5.0, 6.0, SQL, ADO, DAO, ODBC, COM, DCOM, MS-Access/JET databases, Active Server Pages, HTML, VBScript, JavaScript, Microsoft Internet Explorer, Microsoft Office, Microsoft Visual Studio, Microsoft FrontPage98, Microsoft SQL Server 6.5 and 7.0, Microsoft Internet Information Server, Microsoft Access, Microsoft Project

**CERTIFICATIONS**

Currently pursuing Microsoft Certified Solution Developer Certification.  
Microsoft Developer Network Universal Member  
Microsoft SiteBuilder Member

**EDUCATION****EXPERIENCE**

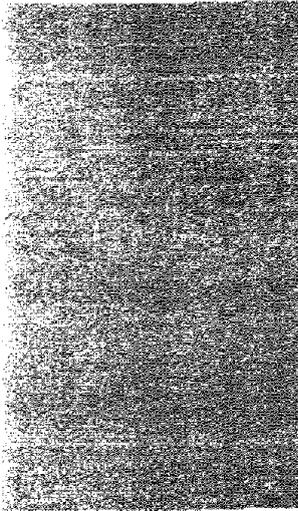
Title Guaranty of Hawaii, Inc., 1999 - Present  
System Engineer, Corporate Information Systems

Primarily responsible for development of corporate imaging applications and supporting systems environment. Also develops server side application to support image retrieval, display and printing functions.

Logical System Services, 1998 - 1999  
Senior Software Developer

Primarily responsible for development of shrinkwrap OEM application to be resold internationally to the security and law enforcement industry. Product developed with Visual Basic 6.0 as an n-tier (distributed) application. Major deliverables include an ActiveX Server component utilizing Access or SQL-Server for data persistence, an ActiveX DLL to enforce business rules and data integrity on the client side, as well as the user interface. Ancillary responsibilities include evaluation and recommendation of third-party tools and code libraries and providing assistance to junior developers.

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**Independent Contractor, 1995 - 1998**  
Software/System Engineer

- Engaged in providing software development services throughout the development cycle from initial design and scope specification to final implementation, training, and documentation, via strategic relationships with VARs/Integrators. Services include participating in sales and project development meetings with clients, recommending application and development tools, project management, source code development, end-user training, maintenance and enhancement. Clients included Hawaiian Airlines - Airline Ticket Imaging, OCR, and Archiving System (25,000 documents per day), State of Hawaii - Office of the Governor - VB Document Management System, KTA Grocery - VB Image Conversion Utility for Document Imaging/Management System, Hawaii Community Foundation, HPU - Pacific Islands Institute, Beechman Agencies, The Law Offices of Tongg & Tongg.

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**NAME**

Carlos Buhk

**POSITION**Director, Record Management  
Title Guaranty of Hawaii, Incorporated**EDUCATION**

Foothill College, Los Altos, California

**EXPERIENCE**Title Guaranty of Hawaii, Inc., 1988 - Present  
Director, Record Management

Carlos is responsible for TG's records management and is the general manager for our property disclosure operations. Carlos has the expertise in designing workflow systems for records management and document imaging.

**Amdahl Computer Company**  
Graphic Communications Director

Managed a staff of 125 employees. Developed and implemented a plan which converted a Drafting department of 30 employees to a Computer Aided Design (CAD) department of five employees. This system eliminated the need for manually updating engineering drawings there by improving turn around time for changes. Responsible for successful conversion of paper Automated Logic Diagrams (ALD) to fiche. Developed a nationally recognized system which produced photo-direct offset printing plates from an image database.

**Lockheed Missiles and Space Company**  
Reproductions Supervisor

Supervised a staff of 25 employees responsible for lithography, blueprinting, duplicating, and micrographics.

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## ATTACHMENT B, STAFF REFERENCES

Per RFP ICS-FY-99-052, Section 2.9.4.5, this section provides at least three (3) references for each TG staff member included in *Attachment A, Staff Resumes*.

NAME	PROJECT POSITION	REFERENCES
Debra Pyrek	TG Executive Manager	<p>Janet Ellis Director, Metro Information Services Virginia Beach, VA (757) 486-1700</p> <p>Greg Colbert Executive Consultant IBM Global Services Honolulu, HI 96734 (808) 597-9394</p> <p>Jack Willey President/CEO ISDI (Interisland Systems Development and Integration) Honolulu, HI (808) 944-8742</p>
Gerald Opedal	Integration Team Manager	<p>Karen D. Tom Bank of Hawaii Assistant Vice President Database Marketing Manager 537-8383</p> <p>Chu Lan Shubert Kwock ABC Mortgage Owner 545-2442</p> <p>Robert K. Vierck Decision Support Services, Inc. President 538-7457</p>

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NAME	PROJECT POSITION	REFERENCES
Steven B. Tomlinson	Integration Team System Specialist	<p>Gregory P. Barbour  Assistant to the Director  DBEDT  No. 1 Capitol District Building  250 S. Hotel St. Room 508  P.O. Box 2359  Honolulu, HI 96804  586-2548</p> <p>Wade Kamikawa  Data Processing Systems Analyst  DBEDT  No. 1 Capitol District Building  250 S. Hotel St. 4th Floor  Honolulu, HI 96813  586-2487</p> <p>Rob Hardisty  Vice President  Strategic Information Solutions  239 Merchant St.  Honolulu, HI 96813  537-5523 Ext. 239</p>
Carlos Buhk	Documents Team Manager	<p>Maryann Kusaka  5151 Nonou Street  Kapaa, HI 96746  822-5444</p> <p>Donald Schoenfeld  1684 Kelaokia Street  Koloa, HI 96756  742-1398</p> <p>Jim Miller  2751 Milohi Loop  Koloa, HI 96756  742-2421</p>

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## ATTACHMENT C, OFFEROR'S FINANCIALS

Per RFP ICS-FY-99-052, Section 2.9.4.6, Offeror's should include financial statements for the previous three years. TG expresses its willingness to provide access to the specified financial information in compliance with this requirement should it be selected as the vendor to perform the BOC Part 2 Project tasks.

Title Guaranty of Hawaii, Incorporated is a privately held corporation registered to do business in the State of Hawaii and is in good standing with the Hawaii State Department Commerce and Consumer Affairs and Department of Taxation. As a privately held corporation, TG considers its financial statements to be confidential and proprietary. Based on our understanding that this proposal will be classified as a public document should TG be selected as the BOC Part 2 Project vendor, we believe that inclusion of our financial statements in this proposal may result in public exposure of corporate information that may compromise confidentiality requirements related to current and prospective TG business.

Upon notification of award to perform the BOC Part 2 Project tasks, TG shall make available, at TG's corporate office in Honolulu, the specified three years of financial statements for review by an authorized State auditor or financial analyst.

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## ATTACHMENT D, OFFEROR'S REFERENCES

Per the instructions provided in RFP ICS-FY-99-052, Section 2.9.4.6, Offeror Background and Experience, this section includes information on our client references.

NAME	POSITION	CONTACT INFO
Michael Packard	CEO, Chaney Brooks	606 Coral Avenue Honolulu, HI. 96813 544-1600
Emory Bush	President, Hawaiiana Property Management Co.	711 Kapiolani Blvd. #700 Honolulu, HI. 96814 593-6866
Ruth Okada	Vice President, Aston Hotel Resort Management Division	Honolulu, HI. 96815 931-1400

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## ATTACHMENT E, SUBCONTRACTOR RESUMES AND REFERENCES

Per the instructions provided RFP ICS-FY-99-052, Section 2.9.4.1, Introduction, this section provides resumes and references for subcontractor staff assigned to our proposed project team.

The required information is provided for Jeffrey Loo our proposed TG Project Leader. Jeffrey is Principal Consultant at J.W. Loo & Associates.

### Resume

A resume for Jeffrey Loo is provided on the following page.

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<b>NAME</b>	Jeffrey W. Loo
<b>POSITION</b>	Principal Consultant J.W. Loo & Associates
<b>PROFILE</b>	<p>Jeffrey has over fifteen years experience implementing management and information system analyses projects in the public and private sectors. He has technical expertise in information systems design and implementation, management and systems analyses, reorganization analysis and project management.</p> <p>He has worked extensively in system development methodology environments including Martin's Information Engineering, Software AG's SDM, Deloitte &amp; Touche's 4Front, and IBM's BSP. He has successfully completed projects in the IBM 3000, IBM 4300, and Prime mainframe, HP 9000 UX and in Microsoft NT/Novell local area network PC environments.</p>
<b>EDUCATION</b>	<p>Ph.D. Candidate, Political Science, University of Hawaii, Manoa  M.A., Political Science, University of Michigan, Ann Arbor  B.A., Political Science, University of California, Berkeley</p>
<b>AFFILIATIONS</b>	<ul style="list-style-type: none"> <li>• Association for Information and Image Management, Aloha Chapter, President (1996 - 1997), Vice President (1993), Education Committee Chair, (1993-1996, 1997 - Present)</li> <li>• Catholic Charities-Family Services, Board Member, (1996- Present)</li> <li>• Catholic Charities, Long Range Planning Committee (1998 - Present)</li> <li>• Aloha United Way, Allocations Panel IV, 1993 - Present</li> <li>• Healthcare Information and Management System Society, Member, 1997 - Present</li> <li>• Immigrant Center, President, 1992 - 1995</li> <li>• Hawaii Society of Corporate Planners, Member, 1991 - 1993</li> <li>• Data Processing Management Association, Member 1991 - 1993</li> <li>• Hawaii Government Employee Association, Member (1976 - 1985), Steward (1980 - 1982) Island Division Representative (1982 - 1984)</li> <li>• State Certified Lemon Law Arbitrator, 1997 - 1999</li> <li>• US Dept. of Commerce, Telecommunications and Information Infrastructure Assistance Program (TIAP), Grants Reviewer, 1998</li> </ul>
<b>RECENT PRESENTATIONS</b>	<ul style="list-style-type: none"> <li>• <i>Health Care Quality Management Information Systems, Outcomes Measurement: Assessing Quality of Health Care in Hawaii</i>, September, 1992</li> <li>• <i>Medical Records and Data: Data Analysis</i>, Institute for Telehealth and Telemedicine, September, 1997</li> </ul>

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**PRESENTATIONS  
(Cont.)**

- *Email Policy Statements*, Association for Information and Image Management: *Legal Frontiers in Electronic Communication & Commerce*, October, 1997
- *Electronic Documents Management Systems*, Association for EDP Auditors, June 1997
- *Electronic Records in a Networked World*, Information System Security Association, January, 1997

**EXPERIENCE**

Projects that Jeffrey has undertaken include the following:

**St. Francis Healthcare System of Hawaii.** Jeffrey is a system architect on this project to develop an integrated clinical and financial decision support system.

**Hawaii Health Information Corporation.** Jeffrey is an outsource technical consultant providing project management services for several clinical data repository projects involving management and analysis of data from all hospitals in Hawaii.

**State of Hawaii, Office of the Attorney General.** Jeffrey was a senior analyst on a project team responsible for developing system design specifications for a state-wide offender tracking system.

**Straub Clinic and Hospital.** Jeffrey was the project manager for a project to implement a clinical data repository containing inpatient and outpatient information extracted from mainframe resident online applications.

**State of Hawaii, Department of Transportation.** Jeffrey was the project manager and senior analyst for this project to design and procure an office automation solution that incorporated imaging system applications to improve the performance of business processes in the airports operations.

**State of Hawaii, Department of Business, Economic Development & Tourism.** Jeffrey was the project manager for a project to implement a unified tax and employer registration form for new businesses in Hawaii.

**State of Hawaii, Office of the Governor.** Jeffrey was responsible for facilitating the development of project plans, analyzing project alternatives, and defining deliverables and schedules for this project to assist the State to comply with court order actions related to the Felix v. Waihee case.

**State of Hawaii, Office of the Governor.** Jeffrey was the manager of a staff team responsible for performing an organization reengineering analysis covering the Executive Branch of the Hawaii state government.

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## References

References that may be called are provided below.

NAME	PROJECT POSITION	REFERENCES
Jeffrey Loo	TG Project Leader	<p>Dr. Susan Forbes, Executive Director Hawaii Health Information Corporation 600 Kapiolani Blvd, Suite 406 Honolulu, Hawaii 96813 (808) 534-0288</p> <p>Ms. Laura Matsuda-Colbert, Vice President Child &amp; Family Services 91-1841 Ft. Weaver Road Ewa Beach, Hawaii 96706 (808) 681-1453</p> <p>Ms. Jean Oshita-Kimura, Administrative Services Officer Department of Transportation, Airports Honolulu International Airport Honolulu, Hawaii 96817 (808) 838-8607</p> <p>Mr. Ryan Ushijima, Securities Commissioner Department of Commerce and Consumer Affairs PO Box 541 Honolulu, Hawaii 96809 (808) 586-2734</p>

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## ATTACHMENT F, TECHNICAL POINT RESPONSE WORKSHEET

Per the instructions provided RFP ICS-FY-99-052, Section 2.9.4.1, Introduction, this section provides the completed Technical Point Response Worksheet for TG.

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TECHNICAL POINT RESPONSE

RFP NO. ICS-99-52  
TECHNICAL POINT RESPONSE WORKSHEET

Cross Reference Location

Specification

- | Cross Reference Location | Specification   |
|--------------------------|---|
| <u>Page 6</u> 1.         | If the specification is addressed in more than one location in the Offeror's Proposal and/or documentation, only the two (2) major cross-reference locations are to be given. |
| _____ 2.                 | 3.5.1 Consistent.   |
| _____ 3.                 | 3.5.2 LAN.  |
| _____ 4.                 | 3.5.3 Operating System Standard.  |
| _____ 5.                 | 3.5.4 Standard Hardware.  |
| _____ 6.                 | 3.5.5 Training.   |
| _____ 7.                 | 3.5.6 Redundancy.   |
| _____ 8.                 | 3.5.7 Access to Information.  |
| _____ 9.                 | 3.5.8 Fees.   |
| _____ 10.                | 3.5.9 Standardization.  |
| _____ 11.                | 3.5.10 Safeguards.  |
| _____ 12.                | 3.5.11 Data Analysis.   |

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### TECHNICAL POINT RESPONSE

- \_\_\_\_\_ 13. 3.5.12 Data Migration.
- \_\_\_\_\_ 14. 3.5.13 Backward Compatibility.
- \_\_\_\_\_ 15. 3.5.14 Working System.
- \_\_\_\_\_ 16. 3.5.15 Disaster Recovery.
- \_\_\_\_\_ 17. 3.5.16 Access Security.
- \_\_\_\_\_ 18. 3.5.17 Minimize Disruptions.
- \_\_\_\_\_ 19. 3.6.1 General Imaging Requirements
- \_\_\_\_\_ 20. 3.6.1.1 The imaging technology proposed must support both locally attached workstations and those that are remotely connected to the imaging server by telecommunications lines.
- \_\_\_\_\_ 21. 3.6.1.2 The proposed system must integrate the BOC's current microfilm capture procedure.
- \_\_\_\_\_ 22. 3.6.1.3 The proposed system must permit any BOC user, with proper hardware and software, to retrieve and view images from the proposed BCIS.
- \_\_\_\_\_ 23. 3.6.1.4 The Offeror's proposal must identify the hardware and software needed to adapt imaging to a variety of needs.
- \_\_\_\_\_ 24. 3.6.1.5 The system shall run on server hardware that can effectively and efficiently support workflow and imaging for the BOC.

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### TECHNICAL POINT RESPONSE

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- \_\_\_\_\_ 25. 3.6.1.6 Jukeboxes must allow for definable allocation of files so that individual platters reflect appropriate BOC retention schedules.
- \_\_\_\_\_ 26. 3.6.1.7 The system must meet any legal requirements for image storage and retrieval while providing the fastest access times possible.
- \_\_\_\_\_ 27. 3.6.1.8 The system shall support batch scanning.
- \_\_\_\_\_ 28. 3.6.1.9 The system shall provide effective methods for scanning and indexing long (maximum 8 1/2"x 14") documents and address the long term goal of incorporating map images.
- \_\_\_\_\_ 29. 3.6.1.10 The proposed system must be able to scan and recognize bar code information.
- \_\_\_\_\_ 30. 3.6.1.11 Offerors must include a two-sided scanner since the BOC receives approximately 200 doubled-sided documents a day.
- \_\_\_\_\_ 31. 3.6.1.12 Users within the BOC shall be able to retrieve an 8 1/2" X 14" document stored on a jukebox in less than 15 seconds (disk mount time and image view time). Please include documentation for jukebox response time.
- \_\_\_\_\_ 32. 3.6.1.13 An image for viewers at a remote site shall be available for transmission in less than 15 seconds.
- \_\_\_\_\_ 33. 3.6.1.14 Users shall be able to retrieve a page from an active file on magnetic media in
- \_\_\_\_\_ 34. 3.6.1.14 less than 2 seconds.

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### TECHNICAL POINT RESPONSE

- \_\_\_\_\_ 35. 3.6.1.15 From magnetic media, users shall be able to turn from one page in a document to another in less than 1 second.
- \_\_\_\_\_ 36. 3.6.1.16 The system shall provide zoom capabilities.
- \_\_\_\_\_ 37. 3.6.1.17 The retrieval screen shall display both the index and the imaged document, simultaneously side by side.
- \_\_\_\_\_ 38. 3.6.1.18 The system shall allow staff to index documents while looking at the documents online.
- \_\_\_\_\_ 39. 3.6.1.19 The system should allow for the long term goal of scanning and printing oversized maps.
- \_\_\_\_\_ 40. 3.6.1.20 The system must allow for 64 electronic comments with 256k minimum per note for each image, visually associated with the document or map.
- \_\_\_\_\_ 41. 3.6.1.21 It is desirable that these be the electronic form of Postit type notes.
- \_\_\_\_\_ 42. 3.6.1.22 Image file formats must support the *Consultative Committee for International Telephone and Telegraph (CCITT) Group III and IV standard*. Images shall be scanned in at a minimum of 200 dpi for most documents and 300X400 dpi for documents with small fonts, handwriting, or detailed line art.
- \_\_\_\_\_ 43. 3.6.1.23 Users shall be able to browse through documents and quickly retrieve selected pages.
- \_\_\_\_\_ 44. 3.6.1.24 Users shall be able to print groups of pages from a long document by simply identifying the range of page numbers, such as 3-5, 8-10.

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### TECHNICAL POINT RESPONSE

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- \_\_\_\_\_ 45. 3.6.1.25 Users shall be able to display two pages of the same document side by side.
- \_\_\_\_\_ 46. 3.6.1.26 The proposed system must have the ability to scan images in random order and present them later in sequence by Official Record Number. (Labels with OR Number will have been attached as part of cashiering).
- \_\_\_\_\_ 47. 3.6.1.27 The proposed system must provide image enhancement capabilities to assure good quality images from scanned documents.
- \_\_\_\_\_ 48. 3.6.1.28 The proposed system must provide the State with the capability to correct the stored image of documents. The original document number must be retained. The legal integrity of the document must be preserved.
- \_\_\_\_\_ 49. 3.6.1.29 The proposed system must permit the capability to generate microfilm images of all scanned documents and map images.
- \_\_\_\_\_ 50. 3.6.1.30 The proposed system must maintain and report statistics for the scanning process, to include number of documents scanned, number of pages scanned (broken down by operator), and the number of errors encountered. These must be accumulated and reported on a daily or monthly basis at the minimum.
- \_\_\_\_\_ 51. 3.6.1.31 The system must be able to export imaging statistics to any major spreadsheet package.
- \_\_\_\_\_ 52. 3.6.2.1 The system must recognize when a document is scanned with another document as an attachment.
- \_\_\_\_\_ 53. 3.6.3.1 The database must be a production class DBMS to ensure data integrity at all times, which

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## APPENDIX A

### TECHNICAL POINT RESPONSE

includes back-ups and recovery capabilities. The preferred databases are DB2 or Oracle. If alternative databases are suggested, please indicate the reason for supporting the alternative.

- \_\_\_\_\_ 54. 3.6.3.2 Capabilities for index and image maintenance and access.
- \_\_\_\_\_ 55. 3.6.3.3 Automatic error detection and recovery.
- \_\_\_\_\_ 56. 3.6.3.4 Dynamic backup of in progress updates after process failure.
- \_\_\_\_\_ 57. 3.6.3.5 All transactions that have not completed successfully as a result of a power failure, failure of any software related to BCIS, failure or unplanned emergency shutdown of any equipment must be backed out. The term completed shall mean the confirmed storage of data related to any part of the transaction. The offeror shall detail the level of compliance with this requirement.
- \_\_\_\_\_ 58. 3.6.3.6 Maintenance of accurate and duplicate audit record on separate physical medium.
- \_\_\_\_\_ 59. 3.6.3.7 Support for mirrored (duplicate) images.
- \_\_\_\_\_ 60. 3.6.3.8 Locking mechanisms to guarantee data integrity.
- \_\_\_\_\_ 61. 3.6.3.9 Deadlock detection and prevention.
- \_\_\_\_\_ 62. 3.6.3.10 Multi-threaded processing to speed access time between users and the database.

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### TECHNICAL POINT RESPONSE

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- \_\_\_\_\_ 63. 3.6.3.11 Concurrent processing of more than one user request accessing the database at the same time.
- \_\_\_\_\_ 64. 3.6.3.12 Formatting of fields and rule based edits by the system administrator.
- \_\_\_\_\_ 65. 3.6.3.13 A complete audit trail of revisions, changes and edits to information in the database.
- \_\_\_\_\_ 66. 3.6.3.14 Backups at a preset time without interrupting database access. Incremental backups shall be supported.
- \_\_\_\_\_ 67. 3.6.3.15 The ability for all fields to be marked "required" or "not required" depending on the
- \_\_\_\_\_ 68. 3.6.3.15 type of data being entered.
- \_\_\_\_\_ 69. 3.6.3.16 Different security levels within the same database for documents.
- \_\_\_\_\_ 70. 3.6.3.17 The ability for users to generate reports and queries according to their needs.
- \_\_\_\_\_ 71. 3.6.3.18 Online, context sensitive help.
- \_\_\_\_\_ 72. 3.6.3.19 Online training facilities for end-users.
- \_\_\_\_\_ 73. 3.6.3.20 "Hot key" capability to move from screen to screen, software to software.
- \_\_\_\_\_ 74. 3.6.3.21 Both menu and key codes for customers.

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### TECHNICAL POINT RESPONSE

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- \_\_\_\_\_ 75. 3.6.3.22 Consistent terminology within a screen, from screen to screen, and in online help and vendor documentation.
- \_\_\_\_\_ 76. 3.6.3.23 Current optical image available online.
- \_\_\_\_\_ 77. 3.6.3.24 Optical image available offline (with platter identified).
- \_\_\_\_\_ 78. 3.6.3.25 Microfilm image available (with reel and image identified).
- \_\_\_\_\_ 79. 3.6.3.26 BCIS must process the condition where no image is available for a document.
- \_\_\_\_\_ 80. 3.6.4.1 Scan heavy card stock
- \_\_\_\_\_ 81. 3.6.4.2 Capture pencil and light markings
- \_\_\_\_\_ 82. 3.6.4.3 Scan a minimum of 8 pages per minute for low volume applications
- \_\_\_\_\_ 83. 3.6.4.4 Scan 8.5 x 11 and 8.5 X 14 size documents
- \_\_\_\_\_ 84. 3.6.4.5 Scan maps up to 18" x 26" depending on the needs of the department. Some older maps have canvas. This requirement is to be a part of Section 3.10.11, Task 12 IS Requirements Study.
- \_\_\_\_\_ 85. 3.6.4.6 Backing; scanners should be able to feed these documents effectively. Must be able to sheet feed full range of documents including standard 8 1/2" X 11" and 8 1/2" X 14".

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### TECHNICAL POINT RESPONSE

86. 3.6.4.7 The proposed system must be capable of utilizing standard brand name laser printers.
87. 3.6.4.8 Optical storage configuration shall include optical disk storage devices that provide the option of selecting WORM or erasable media on the same jukebox. Depending on need, there may be a requirement to migrate images from WORM to erasable to allow editing of documents on erasable media that are also recorded on WORM for unalterable storage.
88. 3.6.4.9 Produce templates to be used to scan in document information required for indexing purposes. The proposed system should also prompt user when it is not able to recognize the information to be captured. This will reduce the effort to
89. 3.6.4.9 manually key in information.
90. 3.7.1 Inter-Island Communications
91. 3.7.2 Local Area Network Requirements
92. 3.7.3 Minicomputer and Work Station Requirements
93. 3.8 UNIX SERVER
94. 3.9 REMOTE ACCESS REQUIREMENTS
95. 3.9.1 Secure Access.
96. 3.9.2 Cost Effective.
97. 3.9.3 Operational Impact.

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98.	3.9.4	Neighbor Island Access.
99.	3.10	IMPLEMENTATION PLAN
100.	3.10.1	Task 1: Implementing a basic BOC network
101.	3.10.2	Task 2: BCIS Requirements Verification
102.	3.10.3	Task 3: Replacement of the Regular and Land Court Systems
103.	3.10.4	Task 4: Implementing Imaging Capability on the BOC Network
104.	3.10.5	Task 5: Implementing Imaging Capability to BCIS
105.	3.10.6	Task 6. Enable Remote Access to Text Data
106.	3.10.7	Task 7. Enable Remote Access to Image Data
107.	3.10.8	Task 8. Enable Public Access to Text Data
108.	3.10.9	Task 9. Enable Public Access to Image Data
109.	3.10.10	Task 10: Data Remediation
110.	3.10.11	Task 11: GIS Requirements Study
111.	3.10.12	Task 12: Load Back Microfilm Images
112.	3.11	WORK PLAN

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_____	113. 3.11.1	Task 1 Work Plan (PART 1)
_____	114. 3.11.2	Task 2 Work Plan (PART 1)
_____	115. 3.11.3	Task 3 Work Plan (PART 1)
_____	116. 3.11.4	Task 4 Work Plan (PART 1)
_____	117. 3.11.5	Task 5 Work Plan (PART 1)
_____	118. 3.11.6	Task 6 Work Plan (PART 1)
_____	119. 3.11.7	Task 7 Work Plan (PART 1)
_____	120. 3.11.8	Task 8 Work Plan (PART 1)
_____	121. 3.11.9	Task 9 Work Plan (PART 1)
_____	122. 3.11.10	Task 10 Work Plan (PART 1)
_____	123. 3.11.11	Task 11 Work Plan (PART 1)
<u>Page 52, App H</u>	124. 3.11.12	Task 12 Work Plan (PART 2)
<u>Page 52</u>	125. 3.11.13	Tasks Common to All Tasks
_____	126. 3.12	PROJECT MANAGEMENT
_____	127. 3.13	CONTRACTOR STAFFING
<u>Page 34</u>	128. 3.13.1	Contractor Employees

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### TECHNICAL POINT RESPONSE

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Page 46	129. 3.13.2	Subcontractor Staffing
	130. 3.14.1	Floor Space Requirements.
	131. 3.14.2	Weight Requirements.
	132. 3.14.3	Power Requirements.
	133. 3.14.4	Operational Environment.
	134. 3.14.5	Additional Configuration Features.
	135. 3.14.6	Quality of Equipment.
	136. 3.14.7	Delivery.
	137. 3.14.8	Installation.
	138. 3.15	EQUIPMENT SERVICE AND SUPPORT PERSONNEL REQUIREMENTS
	139. 3.16	HARDWARE MAINTENANCE REQUIREMENTS.
	140. 3.16.1	Diagnostic Tools and Test Equipment.
	141. 3.16.2	Periods of Maintenance Service.
	142. 3.16.3	Preventative Maintenance.
	143. 3.16.4	Remedial Maintenance.
	144. 3.16.5	Predictive Maintenance.

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## APPENDIX A

### TECHNICAL POINT RESPONSE

_____	145. 3.16.6	Replacement Parts.
_____	146. 3.16.7	Safety Devices.
_____	147. 3.16.8	Parts Availability.
_____	148. 3.16.9	Engineering Changes.
_____	149. 3.16.10	Equipment Modifications.
_____	150. 3.16.11	Hierarchy of Support.
_____	151. 3.16.12	Maintenance Reports.
_____	152. 3.17.1	Error Correction.
_____	153. 3.17.2	Updates.
_____	154. 3.17.3	Hotline Service.
_____	155. 3.17.4	Withdrawn Software.
_____	156. 3.17.5	Response Times.
_____	157. 3.18.1	Grant of License.
_____	158. 3.18.2	Use and Protection of Software.
_____	159. 3.18.3	Other Software Requirements.
_____	160. 3.18.4	Warranty.

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## APPENDIX A

### TECHNICAL POINT RESPONSE

_____	161. 3.19	TIME OF PERFORMANCE
_____	162. 3.20	ACCEPTANCE PROCEDURE
_____	163. 3.20.1	Task 1 Acceptance Test
_____	164. 3.20.2	Task 2 Acceptance Test
_____	165. 3.20.3	Task 3 Acceptance Test
_____	166. 3.20.4	Task 4 Acceptance Test
_____	167. 3.20.5	Task 5 Acceptance Test
_____	168. 3.20.6	Task 6 Acceptance Test
_____	169. 3.20.7	Task 7 Acceptance Test
_____	170. 3.20.8	Task 8 Acceptance Test
_____	171. 3.20.9	Task 9 Acceptance Test
_____	172. 3.20.10	Task 10 Acceptance Test
_____	173. 3.20.11	Task 11 Acceptance Test
_____	174. 3.20.12	Task 12 Acceptance Test
_____	175. 3.20.13	Review of Task Acceptance Tests
_____	176. 3.21	TRAINING

401093

## APPENDIX A

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### TECHNICAL POINT RESPONSE

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<hr/>	177. 3.22	DELIVERABLE PRODUCTS AND SERVICES
<hr/>	178. 3.22.1	Description of Deliverables
<hr/>	179. 3.23	POST IMPLEMENTATION SUPPORT
<hr/>	Page 18	180. 3.24 MAINTENANCE OF OFFICES

401094

## ATTACHMENT G, TAX CLEARANCE PACKET

Per the instructions provided RFP ICS-FY-99-052, Section 2.9.4.6, Offeror Background and Experience, this section provides required original tax clearance forms (Form A-6) for Title Guaranty of Hawaii and J.W. Loo & Associates.

401095

STATE OF HAWAII — DEPARTMENT OF TAXATION  
**TAX CLEARANCE APPLICATION**  
PLEASE TYPE OR PRINT CLEARLY

1. APPLICANT INFORMATION: (PLEASE PRINT CLEARLY)

Applicant Title Guaranty of Hawaii, Inc.  
Address 235 Queen Street  
City/State/  
Zip Code Honolulu, Hawaii 96813  
DBA/  
Trade Name \_\_\_\_\_

2. TAX IDENTIFICATION NUMBER(S):

HAWAII GENERAL EXCISE ID # 1 0 0 0 5 6 6 3  
FEDERAL EMPLOYER ID # 9 9 - 0 1 0 5 0 3 1  
SOCIAL SECURITY # \_\_\_\_\_

3. APPLICANT IS A/AN: (CHECK ONLY ONE BOX)

- CORPORATION       S CORPORATION       TAX EXEMPT ORGANIZATION  
 INDIVIDUAL       PARTNERSHIP       ESTATE       TRUST  
 LIMITED LIABILITY COMPANY       LIMITED LIABILITY PARTNERSHIP

4. THE TAX CLEARANCE IS REQUIRED FOR:

- CITY, COUNTY, OR STATE GOVERNMENT CONTRACT IN HAWAII \*       LIQUOR LICENSE \*  
 REAL ESTATE LICENSE       CONTRACTOR LICENSE       BULK SALES  
 FINANCIAL CLOSING       PROGRESS PAYMENT       PERSONAL  
 HAWAII STATE RESIDENCY       FEDERAL CONTRACT       LOAN  
 SUBCONTRACT       OTHER \_\_\_\_\_

\* IRS APPROVAL STAMP IS FOR PURPOSES INDICATED BY ASTERISK

5. NO. OF CERTIFIED COPIES REQUESTED:

2

6. SIGNATURE:

Lois C. Kawano  
PRINT NAME  
[Signature]  
SIGNATURE

Vice President/Assistant Treasurer  
PRINT SPECIFIC TITLE: Corporate Officer, General Partner, Individual (Sole Proprietor)  
5/6/99      (808) 539-7762      (808) 532-3141  
DATE      TELEPHONE      FAX

FOR OFFICE USE ONLY BUSINESS START DATE IN HAWAII IF APPLICABLE <u>10 1 04 1 60</u>
HAWAII RETURNS FILED IF APPLICABLE 19____ 19____ 19____
STATE APPROVAL STAMP State of Hawaii <b>APPROVED</b> <u>[Signature]</u> MAY 10 1999 per <u>[Signature]</u> Department of Taxation
INTERNAL REVENUE SERVICE <b>APPROVED</b> <u>19-01799</u> MAY 11 1999 per <u>[Signature]</u> Pacific-Northwest District
CERTIFIED COPY STAMP Pacific-Northwest District This copy is acceptable as a substitute for the original tax clearance certificate issued. <u>[Signature]</u> Internal Revenue Service

POWER OF ATTORNEY. If submitted by someone other than a Corporate Officer, General Partner, or Individual (Sole Proprietor), a power of attorney (State of Hawaii Department of Taxation Form N848) must be submitted with this application. If a Tax Clearance is required from the Internal Revenue Service, IRS Form 8821, or IRS Form 2848 is also required. Applications submitted without proper authorization will be sent to the address of record with the taxing authority. UNSIGNED APPLICATIONS WILL NOT BE PROCESSED.

PLEASE TYPE OR PRINT CLEARLY — THE FRONT PAGE OF THIS APPLICATION BECOMES THE CERTIFICATE UPON APPROVAL.

SEE PAGE 2 ON REVERSE & INSTRUCTIONS. Failure to provide required information on page 2 of this application or as required in the separate instructions to this application will result in a denial of the Tax Clearance request.

STATE OF HAWAII — DEPARTMENT OF TAXATION  
**TAX CLEARANCE APPLICATION**  
PLEASE TYPE OR PRINT CLEARLY

APPLICANT INFORMATION:

Applicant Jeffrey W. Loo  
Address Po Box 72205  
City/State/Zip Code Honolulu, HI 96823  
DBA/Trade Name J.W. Loo & Associates

2. TAX IDENTIFICATION NUMBER(S):

HAWAII GENERAL EXCISE ID # 1 0 2 9 0 9 5 5  
FEDERAL EMPLOYER ID # \_\_\_\_\_  
SOCIAL SECURITY # 5 6 3 7 2 9 0 2 5

3. APPLICANT IS A/AH: (CHECK ONLY ONE BOX)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> CORPORATION               | <input type="checkbox"/> S CORPORATION                 | <input type="checkbox"/> TAX EXEMPT ORGANIZATION               |
| <input checked="" type="checkbox"/> INDIVIDUAL     | <input type="checkbox"/> PARTNERSHIP                   | <input type="checkbox"/> ESTATE <input type="checkbox"/> TRUST |
| <input type="checkbox"/> LIMITED LIABILITY COMPANY | <input type="checkbox"/> LIMITED LIABILITY PARTNERSHIP |  |

THE TAX CLEARANCE IS REQUIRED FOR:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> CITY, COUNTY, OR STATE GOVERNMENT CONTRACT IN HAWAII * | <input type="checkbox"/> LIQUOR LICENSE *   |
| <input type="checkbox"/> REAL ESTATE LICENSE   | <input type="checkbox"/> CONTRACTOR LICENSE |
| <input type="checkbox"/> FINANCIAL CLOSING   | <input type="checkbox"/> PROGRESS PAYMENT   |
| <input type="checkbox"/> HAWAII STATE RESIDENCY  | <input type="checkbox"/> FEDERAL CONTRACT   |
| <input type="checkbox"/> SUBCONTRACT   | <input type="checkbox"/> OTHER _____        |
|  | <input type="checkbox"/> BULK SALES         |
|  | <input type="checkbox"/> PERSONAL           |
|  | <input type="checkbox"/> LOAN               |

\* IRS APPROVAL STAMP IS FOR PURPOSES INDICATED BY ASTERISK

5. NO. OF CERTIFIED COPIES REQUESTED:

2

6. SIGNATURE:

Jeffrey W. Loo PRINCIPAL  
PRINT NAME PRINT SPECIFIC TITLE: Corporate Officer, General Partner, Individual (Sole Proprietor)  
Jeffrey W. Loo 5-10-99 (808) 528-7176 (808) 523-8543  
SIGNATURE DATE TELEPHONE FAX

**POWER OF ATTORNEY.** If submitted by someone other than a Corporate Officer, General Partner, or Individual (Sole Proprietor), a power of attorney (State of Hawaii Department of Taxation Form NS48) must be submitted with this application. If a Tax Clearance is required from the Internal Revenue Service, IRS Form 8821, or IRS Form 2848 is also required. Applications submitted without proper authorization will be sent to the address of record with the taxing authority. **UNSIGNED APPLICATIONS WILL NOT BE PROCESSED.**

LEAVE TYPE OR PRINT CLEARLY — THE FRONT PAGE OF THIS APPLICATION BECOMES THE CERTIFICATE UPON APPROVAL.

SEE PAGE 2 ON REVERSE & INSTRUCTIONS. Failure to provide required information on page 2 of this application or as required in the separate instructions to this application will result in a denial of the Tax Clearance request.

FOR OFFICE USE ONLY

BUSINESS START DATE IN HAWAII  
IF APPLICABLE  
8/1/85

HAWAII RETURNS FILED  
IF APPLICABLE  
19\_\_ 19\_\_ 19\_\_

STATE APPROVAL STAMP  
*APPROVED*  
MAY 14 1999  
per A. Shimizu

Department of Taxation  
INTERNAL REVENUE SERVICE  
*APPROVED*  
99-00379  
MAY 14 1999  
per S. Uley  
Pacific-Northwest District

CERTIFIED COPY STAMP  
Pacific-Northwest District  
This copy is acceptable as  
a substitute for the original  
tax clearance certificate issued.  
Paul Bena  
Internal Revenue Service

## ATTACHMENT H, WORK PLAN

Per the instructions provided RFP ICS-FY-99-052, Section 3.11.12, Task 12 Work Plan, this section provides the required work plan for Task 12.

Task Name	Usage	Res List	1999		1999			2000				
			Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	
<b>Perform Project Management</b>												
Develop Approved Project Work Plan												
Review Part 1 Team Proposed Solution	8	TGEM TGPM	■									
Identify New and Modified BOC Requirements	4	TGPM	■									
Identify Scope and Implementation Issues	2	TGPM	■									
Assess Impact on Part 2 Implementation	6	TGEM TGPM	■									
Develop Detailed Project Work Plan	6	TGPM		■								
Present Detailed Project Work Plan	4	TGEM TGPM										
Perform Mutually Agreed Modifications	2	TGPM										
Negotiate Fees for Modified Activities	6	BPM TGEM TGPM		■								
Approve Final Project Work Plan	4	BPM TGEM TGPM										
Perform Project Management Activities												
Develop Management Reports and Processes	8	TGPM										
Implement Project Team Training	44	TGEM TGPM ITM ITDS ITNE DTM		■								
Monitor Progress on Deliverables	128	BPM TGEM TGPM			■	■	■	■	■	■	■	■
Monitor and Resolve Project Issues	32	TGPM			■	■	■	■	■	■	■	■
Perform Project Status Meetings												
Develop Project Status Reports	64	TGPM			■	■	■	■	■	■	■	■
Attend Project Status Meetings	128	BPM TGPM			■	■	■	■	■	■	■	■
<b>Implement Backfile Review Preparation</b>												
Develop Document Review Process												
Define Document Review Tasks and Procedures	12	DTM DTS		■								
Define Missing Document Scan Tasks and Procedures	12	DTM DTS										
Develop Document Review System Environment												
Develop Document Index Transfer Database	8	ITM ITDS										
Implement Document Image Transfer Repository	48	ITM ITDS ITNE		■								
Perform Workstation Preparation												
Define Document Review Workstation Requirements	12	ITM ITDS										
Procure Required Hardware, Software, and Supplies	6	ITDS	■									



Task Name	Usage	Res List	1999 Aug	1999 Sep	1999 Oct	1999 Nov	1999 Dec	2000 Jan	2000 Feb	2000 Mar	2000 Apr
Coordinate Network Link Install to BOC Image Server	8	ITNE	■								
Perform Preliminary Image Transmission Tests	8	ITDS	■								
Perform Corrective Actions	8	ITDS	■								
<b>Perform Document Image Migration Planning</b>											
Identify BOC/TG Operations Issues	16	DTS	■								
Define Batch Transmission Protocols	8	DTS	■								
Define Document Image Batches	16	DTS	■								
Develop Document Image Migration Checklists	4	DTM	■								
<b>Perform Document Image Migration</b>											
Implement Document Image Migration	16	DTS		■							
Select Defined Document Image Batches	16	ITDS		■							
Execute Image Transmission	16	DTS		■							
Perform Quality Review Checks	6	BPM TGEM TGPM		■							
<b>Perform Acceptance Tests</b>											
Negotiate Acceptance Test Criteria	32	BPM TGPM		■							
Monitor BOC Random Sampling Activities	24	DTM		■							
Assess Identified Defects	24	DTM		■							
Perform Agreed Upon Defect Resolution Activities	24	DTO		■							

5/26/99

## Gantt Chart

Page 4-1

## BOC Part 2 Project

Task Name	Usage	Res List	1999		1999		2000			
			Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
BOC Project Manager	8.0	BPM	12	20	17	15	16	14	15	16
TG Executive Manager	8.0	TGEM	18	7	4	4	5	4	4	5
TG Project Leader	8.0	TGPM	58	41	37	32	35	30	32	35
Integration Team Manager	8.0	ITM	32							
Integration Team Sys Spec	8.0	ITDS	97	8	2	2	2	2	2	2
Integration Team Net Engr	8.0	ITNE	34							
Documents Team Manager	8.0	DTM	30	4	4	4	5	2	2	2
Documents Team Spec	8.0	DTS	98	19	17	17	18	15	15	11
Documents Team Operators	96.0	DTO	24	991	989	989	1,081	938	985	607
Totals			402	1,090	1,070	1,062	1,162	1,006	1,054	678

401102

BENJAMIN J. CAYETANO  
GOVERNOR



RAYMOND H. SATO  
COMPTROLLER

MARY PATRICIA WATERHOUSE  
DEPUTY COMPTROLLER

Barbara Tom

STATE OF HAWAII  
DEPARTMENT OF ACCOUNTING  
AND GENERAL SERVICES  
P.O. BOX 119  
HONOLULU, HAWAII 96810-0119

October 28, 1998

Ms. Lois Kawano  
Title Guaranty of Hawaii, Inc.  
235 Queen Street  
Honolulu, HI 96813

Dear Ms. Kawano:

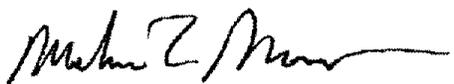
SUBJECT: Compliance Review Results Notification  
ICS-FY-99-22  
Services to Develop and Implement a Replacement Land Court and Regular  
Automated Tracking System for the State of Hawaii

You are hereby notified that the Compliance Review procedure for RFP ICS-FY-99-22  
has been completed. The results of the review of your proposal are listed below.

- The proposal has successfully completed the Compliance Review and will be submitted for Substantive Review.
- The proposal is NOT in compliance with the requirements specified in the RFP. The proposal will NOT be evaluated further and is eliminated from consideration at this time.

If you have any questions on this matter, please call the Contact Person specified in Section 2.4, Procurement Officer, and/or Contact Person.

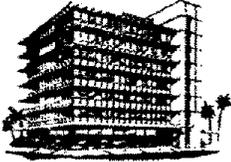
Aloha,

  
Melvin C. Morris, Acting Administrator  
Information and Communication  
Services Division

401103

**COPY**

**PROPOSAL AND TRANSMITTAL LETTER**



**TITLE GUARANTY OF HAWAII**

INCORPORATED

235 QUEEN STREET • P.O. BOX 3084 • HONOLULU, HAWAII 96802 • TELEPHONE 533-6261

October 22, 1998

Ms. Barbara Tom, Data Processing Systems Manager  
Information and Communication Services Division  
Department of Accounting and General Services  
1151 Punchbowl Street, Rm. B10  
Honolulu, Hawaii 96813

Dear Ms. Tom:

SUBJECT: Transmittal Letter

The undersigned has carefully read and understands RFP No. ICS-FY-99-22 and hereby proposes, if selected, to furnish and deliver all items stated in this Proposal.

Any questions which the Information and Communication Services Division or the State of Hawaii may have regarding this proposal should be directed to:

Name: Michael A. Pietsch  
Title: President  
Company: Title Guaranty of Hawaii, Inc.  
Address: 235 Queen Street, 7<sup>th</sup> Floor  
City: Honolulu, HI 96813  
Telephone No: (808) 521-0259  
Facsimile No: (808) 532-3160

The undersigned further understands and agrees that:

1. All addenda to this RFP have been received and are understood.
2. The undersigned is a corporation which is registered with the Business Registration Division of the State of Hawaii Department of Commerce and Consumer Affairs to do business in the State of Hawaii; and has a State of Hawaii General Excise Tax License by the start of the work.
3. A statement from each subcontractor is appended to the Transmittal Letter and signed by an individual authorized to legally bind the subcontractor.

401104



Ms. Barbara Tom, Data Processing Systems Manager  
Information and Communication Services Division  
Department of Accounting and General Services  
October 22, 1998

4. It is understood that the State of Hawaii reserves the right to reject any and all Proposals and to waive any defects, when in the State's opinion, such rejection and waiver may be made in the best interest of the State.
5. By Submitting this proposal, the undersigned is declaring that the proposal is not in violation of Section 84-15, Hawaii Revised Statutes, concerning prohibited State contracts and that the undersigned is certifying that this proposal was arrived at independently, without consultation, communication or agreement with any other Offeror or competitor. No attempt was made or will be made by the undersigned to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
6. This proposal shall remain in effect until April 23, 1999, and that the prices listed in the proposal are firm and shall remain so throughout performance of the work.
7. If awarded the Contract, any services performed must be performed in accordance with Section 103D, Hawaii Revised Statutes.
8. This proposal contains assumptions and constraints which have not been approved in advance by the State of Hawaii.
9. The undersigned acknowledges that the entire RFP has been read and understood and agrees to be bound by its terms and conditions.

Respectfully submitted,

TITLE GUARANTY OF HAWAII, INC.



Michael A. Pietsch  
President

Hawaii General Excise Tax License No: 10005663  
Federal I.D. No: 99-0105031

401105



Department of Accounting and General Services  
Information and Communication Services Division  
1151 Punchbowl Street, Room B-10  
Honolulu, Hawaii 96813

October 22, 1998

Attention Procurement Officer

To Whom It May Concern:

RE: RFP-ICS-FY-99-22

This letter is to acknowledge that we have examined the Information and Communication Services Division's "Request for Proposals for Services to develop and Implement a Replacement Land Court and Regular Automated Tracking System for the State of Hawaii, specifically for the Department of Land and Natural Resources, Bureau of Conveyances" and express our willingness to perform the work as indicated below.

1. Provide a scanning system (hardware and software) capable of high volume batch scanning.
2. Provide image capture software capable of processing scanned images; image de-skewing; de-speckling and other image clean up functions, OCR recognition of key document information (including at a minimum, document number and recording date).
3. Provide programming and scripting services to release document images and indexes to a selected database and imaging archive media.

**2.8.3 Subcontractor's Statement**

You may contact me at 808-537-5523 extension 230 or email any questions to rhardisty@sis.net. We look forward to working with you.

Sincerely,

Robert C. Hardisty  
Vice President

401106

CC: Cynthia Nakaya, Vice President Title Guaranty of Hawaii

## Section II

### EXECUTIVE SUMMARY

Imaging technology has revolutionized the way in which documents are processed and managed. Not since the introduction of computerized databases has business been confronted with the opportunity for greater excellence. In 1993 Title Guaranty of Hawaii, Incorporated (TG) seized this opportunity for improvement. Our success in administrating this change has brought us closer to our vision of a paperless environment.

We commend the Bureau of Conveyances (BOC) for also recognizing the significance of new imaging technology. TG has had great success in integrating this technology to its workflow processing, and is confident that future cost savings of this endeavor will be significant.

Since 1993 we have designed and implemented a similar electronic system of capturing, storing, retrieving and using imaged documents in our workflow. These documents include those recorded at the BOC. Our knowledge and more importantly our experience qualify us to be a top candidate for this Project.

Although we have the expertise to perform all of the requirements in RFP No. ICS-FY-99-22 (RFP), because of our limited resources, we are not able to propose a solution for all four phases. TG recently completed the integration of imaged documents into its title plant data entry workflow and will be starting a project to image its title research files. With this in mind, we narrowed the scope of our reply to address the imaging requirements outlined in the RFP. TG could easily provide a very cost-effective solution for the creation of an image database.

Our proposal addresses the imaging requirements outlined in Phase 3 of the RFP. The scope of our work is segmented in three parts:

Part I – Document Imaging System

Part II – Microfilm Document Storage

Part II – Historical Documents on Microfilm

Based on our experience in developing a similar electronic-based title system, we recommend the installation of a document imaging system prior to the completion of Phase 1 & 2. Immediate implementation will allow the BOC to take full advantage the upcoming enhanced electronic system. A system to scan current recorded documents could be designed and implemented within a short period and would be designed for future integration with the enhanced Regular and Land Court Systems.

401107

Section II

**EXECUTIVE SUMMARY - continued**

We strongly recommend that the BOC take advantage of our experience in imaging recorded documents and in-depth understanding of the BOC's current environment. We offer a very cost-effective approach solution to document imaging; one that meets the BOC's need and the needs of the general public.

401108

## Section III

### PROJECT APPROACH, WORK PLAN

One of the primary objectives of this project is the enhancement of the BOC's current Land Court and Regular systems document data capture, storage and retrieval. A key component of this enhanced system is the use of document images in the Bureau's daily workflow

The Implementation Plan as stated in the RFP segments this project into four phases. Phase 3 of the Plan is the imaging of documents. Based on our experience in developing a similar electronic-based title system, we recommend the installation of a document imaging system prior to the completion of Phase 1 & 2. Immediate implementation of document imaging will allow the BOC to take full advantage the upcoming enhanced electronic system. A system to scan current recorded documents could be designed and implemented within a short period and would be designed for future integration.

The scope of our proposal is segmented into three parts: Part I - Document Imaging System, Part II – Microfilm Document Storage, and Part III- Historical Documents of Microfilm.

#### **Part I – Document Imaging System**

The objective of this first part is to establish an universal document image system within a short period of time. The scope of this work is as follows:

- Design a system to capture current recorded documents electronically. This system will include:
  - Creation of a universal TIFF (Tagged Image Format File) for each document.
  - Creation of an index system for documents scanned. This index could include document number, recording date, and system type (land court and regular). We will utilize optical character recognition to capture the index information.
  - Storage of recorded documents for a ten-day period on the hard drive (access would be within 2 seconds).
  - Creation of CD-ROMs to store imaged documents for subsequent use.
- Design a viewing and printing system for internal (BOC) access to documents.

401109

### Section III

#### PROJECT APPROACH, WORK PLAN - continued

- Purchase software, hardware and set-up cable and electrical system at the BOC
- Perform additional programming to customize scanning software to the BOC's needs.
- System testing (could be done at TG to minimize interruption of BOC staff)
- System implementation

This work plan could be designed and implemented by December 15, 1998. The system design would consider future integration with the other processes of the Regular and Land Court Systems. Industry-standard interfaces and drivers will be used to enable universal support with a wide range of applications.

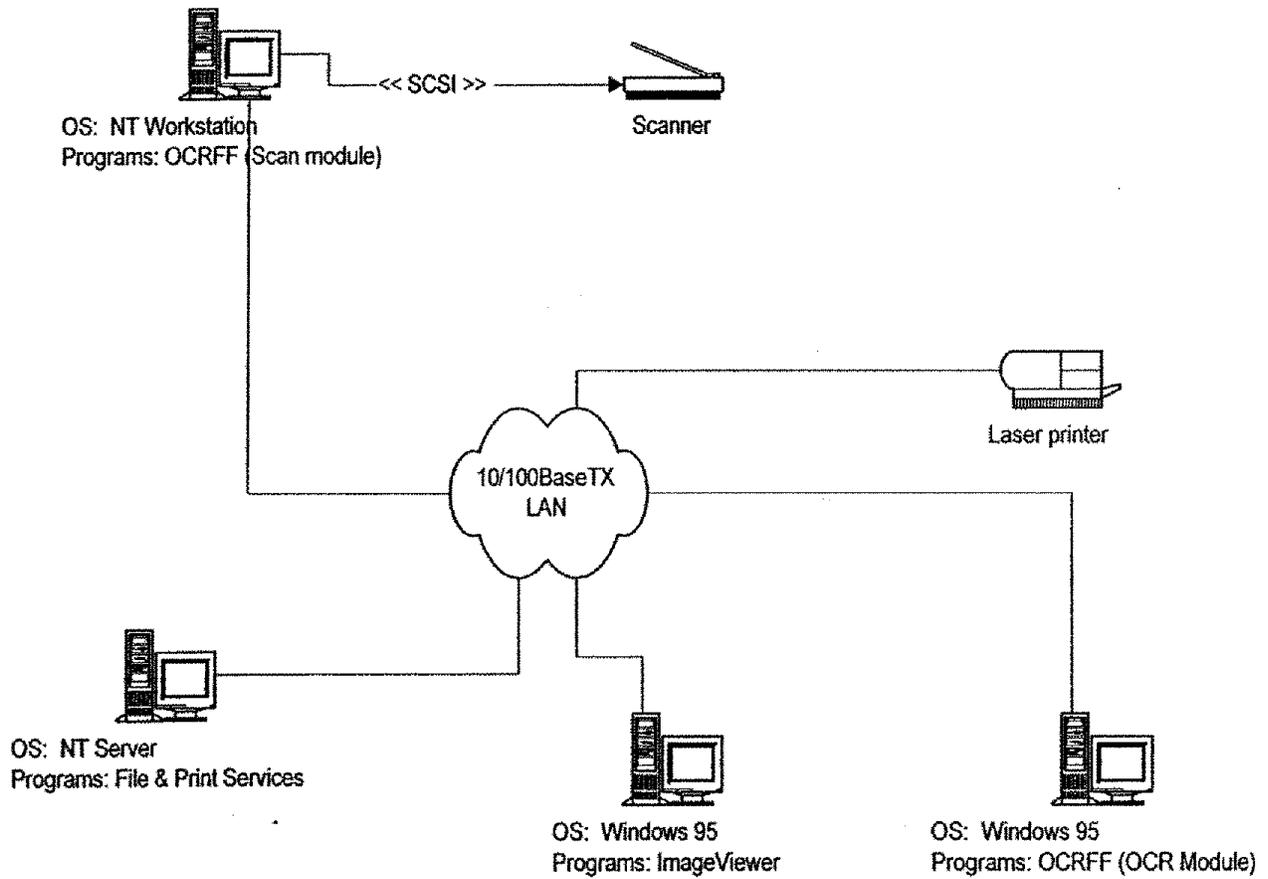
Attached is a proposed document imaging system network configuration and work schedule.

401110

Section III

**PROJECT APPROACH, WORK PLAN - continued**

Proposed document imaging system network configuration:



401111

Section III - Part I, Proposed Work Schedule

ID	BOC - Document Image System	Week 1	Week 2	Week 3	Week 4	Week 5
1		11/8/98	11/15/98	11/22/98	11/29/98	12/6/98
2	Finalize system design					
3						
4	Purchase hardware					
5						
6	Purchase software and program specific to the BOC's needs					
7						
8	Test System					
9						
10	Install System at the BOC					

401112

Project: boocp.tg8  
Date: Tue 10/20/98

Task: [Patterned Box] Summary: [Patterned Box]

Split: [Patterned Box] Rolled Up Task: [Patterned Box]

Progress: [Patterned Box] Rolled Up Split: [Patterned Box]

Milestone: [Diamond] Rolled Up Milestone: [Diamond]

Project Summary: [Patterned Box]

External Tasks: [Patterned Box]

Rolled Up Progress: [Patterned Box]

### Section III

#### PROJECT APPROACH, WORK PLAN – continued

##### **Part II – Microfilm Document Storage**

There are several possible solutions for the continuance of microfilm document storage. One option is the purchase of a dual-purpose scanner, like the Kodak Microimager 990, which has a price range up to \$100,000. The other option, which we recommend, is to first build a fairly simple, cost effective scanning system, as described in Part I above. The current BOC staff would continue to process documents to microfilm until a cost-effective solution for microfilm is implemented.

Our future plan for the creation microfilm documents requires the purchase of a separate component to create the microfilm reel from the digitized image. The use of a separate component for microfilm minimizes the loss of downtime if a piece of equipment requires repair and maintenance. It also provides more flexibility for future upgrades of scanning or microfilm devices.

##### **Part III – Historical Documents on Microfilm**

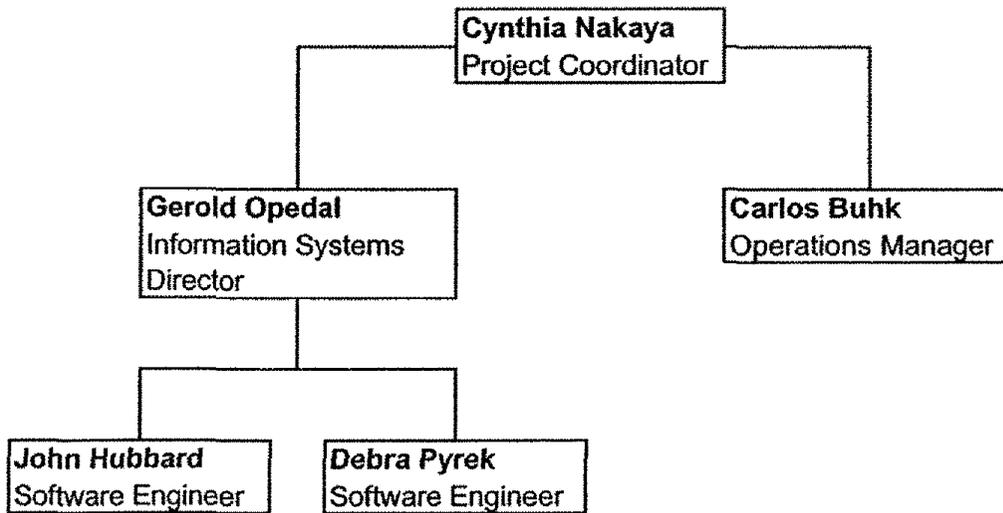
Over the past ten years, the BOC prepared an average of 4 reels of microfilm containing 320 recorded documents on a daily basis. Given this estimate, there are approximately 3,328,000 documents recorded since 1988, which are contained in approximately 10,400 microfilm reels. It would take an individual at least 6 years to scan and index these documents from microfilm to digitized images.

The most economical solution for the BOC to obtain historical document images would be the purchase the images at a discounted rate. In 1994 TG invested the labor and cost to image documents recorded since 1986. These documents are currently stored on CD ROMs and are available for purchase.

401113

Section IV

**ORGANIZATION AND STAFFING**



Work Location: All personnel reside at the Title Guaranty Building  
235 Queen Street, Honolulu, Hawaii 96813

Phone Number: (808) 533-6261

Fax Number: (808) 533-5854

401114

## Section V

### BACKGROUND AND EXPERIENCE

#### **Our Company**

Title Guaranty of Hawaii, Incorporated (TG) is the oldest and largest kamaaina title insurance company in the State of Hawaii. Our roots trace back to 1896, with the formation of Makinney and Company; and to 1946, with the formation of Hawaiian Title Company. In 1952, Makinney and Company merged with Hawaiian Title Company, Limited to form Title Guaranty of Hawaii, Incorporated.

TG is located at 235 Queen Street in the Title Guaranty Building. Our sister company, Title Guaranty Escrow Services, Inc. has its main downtown branch in the same building and also has 12 additional branch offices located throughout the islands. There are five escrow branches on Oahu, three on the Big Island, three on Maui and one on Kauai. Our neighbor island escrow branches provide assistance to the title company in obtaining real property tax information and court proceedings to support our title research.

TG is headed by Michael Pietsch, President, and employs over 200 people. Our title operation is supported by administrative departments responsible for our in-house title plant, records management system, and information systems. Our Information Systems department is staffed by nine people, which include Wang VS Programmers, Software Engineers, and Hardware Technicians.

#### **Our Computerized Title Plant**

TG is the only title company in the State of Hawaii with a complete in-house title plant. Our title plant consists of copies or recorded documents and translations of early documents written in Hawaiian, dating back to the 1800's. It includes Grantor/Grantee indexes (found at the Bureau of Conveyances), court proceedings relating to real property from all circuits (found at the State Archives and Circuit Courts), and Tax Map information (found at the Real Property Assessment Division, Mapping Branch). We also maintain Federal District Court and Bankruptcy Court records.

In 1960 we began to maintain an internal indexing system by tax map key of all Regular system recorded documents. In 1986 TG automated this system into a computerized database. The database is updated daily for all documents recorded in both Regular and Land Court systems, and new Circuit and Federal court proceedings. Real property tax assessment information is also maintained by tax map key. Our computerized database provides on-line access to property transactions for the past twelve years.

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## Section V

### BACKGROUND AND EXPERIENCE - continued

#### **Our Imaging Projects**

Since 1993 TG has designed and implemented several imaging projects. Our imaging project team has vast experience in designing systems specific to our title operations. We have realized significant cost savings as a direct result of efficiencies in workflow. The following is a list of completed and on-going image-based systems:

##### **Documents and Tax Maps**

In 1993 our Imaging Project team worked with numerous vendors to design a system to digitize documents from microfilm. This document system includes tax maps, Land Court documents and Regular System documents (by liber/page before 1990). Our image system scans the microfilm documents, performs Optical Character Recognition (OCR) of Bureau-assigned document numbers for each document, automatically builds the document index, and allows for human verification of the index. At present, three reels of microfilm or approximately 240 documents or 1,700 pages are processed into the digital library each day.

More than 21 million pages, which includes documents recorded since 1986, have been digitized. Images are currently available to 125 concurrent users within our title and escrow companies. Images are currently stored in 20 NSM jukeboxes daisy chained together and connected to the main TG network. Documents can be retrieved in 13 seconds. Our ultimate gain in creating a digitized library of documents was realized by the integration of these images to our title research workflow and customer service.

##### **Integration of Imaged Documents to Title Research**

In 1995 TG designed a unique split screen system for title researchers which enables the simultaneous view of recorded documents and property transactions, while preparing the title report. The integration of our imaging system into our workflow, has significantly increased productivity and capacity within the Company. Our clients have also realized significant improvement in our servicing time.

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## Section V

### BACKGROUND AND EXPERIENCE - continued

#### **Property Management Document Disclosure**

In 1996 the State of Hawaii enacted the Condominium disclosure laws requiring specific documents to be provided to prospective buyers of condominium units. As a result, large property management companies of these projects were faced with the administrative burden of providing copies of various documents. Several management companies concluded that the process of updating and compiling up to 20 different document types for a full disclosure request required additional staffing and storage space. TG offered an alternative solution using an imaged-based document system.

TG currently provides an image-based document system for five property management companies. Our clients include Chaney Brooks & Company and Hawaiiana Management Company. Unrecorded documents (ex. Reserve Study Reports, meeting minutes, etc.) are received and scanned to our image database. TG delivers the disclosure request by compiling various recorded and unrecorded documents. A condominium disclosure packet can be prepared and packaged in less than 30 minutes due to high-speed, on-line document retrieval.

#### **Integration of Image Documents to Title Plant**

In 1998 TG fulfilled one of its dreams . . . to create a paperless environment in its title plant. Our image project team designed a unique split-screen system to enable the simultaneous view of recorded documents and data entry screens. In October 1998 we discontinued the printing of recorded documents from microfilm. Our title plant was finally relieved of handling 250 documents each day.

#### **Escrow File Imaging**

In July 1998 we implemented an electronic file storage and retrieval system for our sister Company's escrow transaction files. This file scanning system is located at our record center facility in Moanalua. The system scans approximately 10,000 pages each day using one scanner.

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Section VI

**PRICE**

We propose the following pricing for the scope of services outline in Section III:

Phase III – Implementing Imaging Capability

Part 1 - Document Imaging System

System Design	\$ 19,000
System Procurement	58,000
System Implementation	6,000
SUBTOTAL	83,000
Discount at 35% *	( 29,050)
TOTAL PRICE	\$ 53,950

The imaging system is a turnkey project. In addition to the price above, the BOC has the option of purchasing annual maintenance for the software and scanner at an annual cost of \$3,100.

\* Terms: TG requests to receive a copy of the imaged documents at no charge. Upon receipt of payment for services rendered, on a go-forward basis, TG will reimburse the BOC for the duplication cost of the images.

Part II - Microfilm Document Storage

Our limited research did not identify a cost-effective solution for the processing of documents to microfilm. We request additional time to research options for microfilm equipment. We plan to obtain a separate equipment component to create microfilm from the digitized image. This component equipment would be a part of the scanning network.

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Section VI

**PRICE - continued**

Part III - Historical Microfilm Document Imaging

We propose two purchase options for copies of historical documents in a digitized format:

- Option 1: The BOC could purchase, in bulk, historical documents in a digitized format for \$ 0.09 a page.
  
- Option 2: the BOC could establish on-line access to TG's document imaging system. Document may be retrieved by the BOC for \$ 0.35 a page.

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Section VII

**CERTIFICATION**

I certify the following:

- The prices and cost data were arrived at independently, without consultation, communication, or agreement with any other Offeror or competitor.
- Unless otherwise required by law, the prices and cost data that were submitted have not been knowingly disclosed by the Offeror, directly or indirectly, to any other Offeror or competitor prior to the award of the contract.
- No attempt was made or will be made by each Offeror to induce any other person or firm to submit or not to submit a price for the purpose of restricting competition.
- The price shall remain in effect for six (6) months following the date that proposals are due.



Micheal A. Pietsch  
President

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Attachment A

**STAFF RESUMES**

**Cynthia Nakaya, - Vice President, Title Systems**

Education: B.A. Chaminade University

Work Experience: Employed at TG since 1972

Cynthia is a key person in the coordination of all computer projects discussed in Section V. Her 26 years of experience in the title industry and knowledge gained from planning and implementing all of our imaging projects is a great asset to this BOC project.

**Carlos Buhk, Director, Record Management**

Education: Foothill College

Work Experience: Employed at TG since 1988  
Amdahl Computer Company, Graphic communications  
Director  
Lockheed Missiles and Space Company, Reproductions  
Supervisor

Carlos is responsible for TG's records management and is the general manager for our property disclosure operations. Carlos has the expertise in designing workflow systems for records management and scanning. He will be responsible to test the system, write operating procedures and train BOC staff.

**Gerald Opedal, Vice President, Information Systems Department**

Education: B.S. University of Hawaii

Work History: Employed at TG since 1987  
Bishop Trust, Co.Ltd – Programmer/Analyst

Gerald is key person in the execution of all computer projects discussed in Section V. He manages a staff of eight personnel in his department.

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Attachment A

**STAFF RESUMES – continued**

**John Hubbard, Senior Software Engineer**

Education: B.S. Utah State University  
Microsoft Certified Systems Engineer, NT 3.51/4.0, SQL Server  
6.0/6.5  
Navy Nuclear Power School, Navy Prototype School, Navy  
Instructor School

Work Experience: Employed at TG since 1996  
Visiontec, LLC – Network/Programming Consultant  
U.S. Navy - Submarine Department Head  
U.S. Navy - Engineering Division Officer in Charge of Training

John is a key software engineer in imaging projects. He is skilled in the following  
program languages & environments:

Operating Systems: Windows 3.x, Windows 95 and 98, Windows NT, DOS

Languages, Tools and Technologies: C, C++, Java, Transact-SQL 6.x, Microsoft  
foundation Classes (MFC) & Windows 95/98/NT, Visual Basic 3.0/4.0/5.0, Install  
shield 5.x script, and ProComm95 scripting.

John will be the main programmer for the BOC Project.

**Debra Pyrek, Senior Software Engineer**

Education: B.S. University of Illinois

Work Experience: Employed at TG since 1994  
Metro Information Services – Systems Consultant  
Advante International Corporation - Senior Software Engineer  
Sargent & Lundy Engineers - Control & Instrumentation  
Human Factors Engineer

Debra is a key software engineer in imaging projects. She is skilled in the following  
program languages & environments:

Operating Systems: Windows 3.x, Windows 95 and 98, Windows NT, DOS, Unix  
(Sun Solaris), OpenWindows

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Attachment A

**STAFF RESUMES – continued**

Languages, Tools and Technologies: Visual Basic, SQL, SourceSafe, numerous third party controls for Visual Basic, Logic Works' ERwin/ERX (CASE Tool), ODBC, RDO and DAO, C, Visio, Internet tools (Netscape, Internet Explorer, Eudora, Outlook), FrontPage (Web design), InstallShield, DemoShield, Remote Access Services and Dial Up Networking, TCP/IP, FTP, Telnet, CRON, Volume Manager (storage array management), Database replication using Sybase Replication Server and MS Replication Server

Debra will assist John in programming for the BOC Project.

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Attachment B  
**INFORMATION AND COMMUNICATION SERVICES DIVISION**  
**STAFF REFERENCE INFORMATION**

To be completed by Offeror. (See instructions on back of form).

OFFEROR INFORMATION		
1. Name of Offeror TITLE GUARANTY OF HAWAII, INC.	2. RFP Reference Number ICS-FY-99-22	
STAFF INFORMATION		
3. Proposed Staff Name on Resume CYNTHIA NAKAYA	4. Position Project Coordinator	7. Phone Number 533-6261

REFERENCE #1 INFORMATION	
6. Reference Name Frances Hamabata	7. Phone Number (808) 935-5732
8. Title Paralegal with Law Office of Raymond Hasegawa	
9. Organization Name Law Offices of Raymond Hasegawa	
10. Organization Address 688 Kinoole Street, Suite 203, Hilo, HI 96720	

REFERENCE #2 INFORMATION	
6. Reference Name Laurie Kuribayashi	7. Phone Number (808) 521-9200
8. Title Attorney	
9. Organization Name Cades Schutte, Fleming & Wright	
10. Organization Address 1000 Bishop Street, Honolulu, HI 96813	

REFERENCE #3 INFORMATION	
6. Reference Name Stephen Sekiya	7. Phone Number (808) 543-4734
8. Title Senior Land Agent	
9. Organization Name Hawaiian Electric Company	
10. Organization Address 220 South King Street, Suite 1480 Honolulu, Hawaii 96813	

**INFORMATION AND COMMUNICATION SERVICES DIVISION  
STAFF REFERENCE INFORMATION**

To be completed by Offeror. (See instructions on back of form).

OFFEROR INFORMATION		
1. Name of Offeror TITLE GUARANTY OF HAWAII	2. RFP Reference Number ICS-FY-99-22	
STAFF INFORMATION		
3. Proposed Staff Name on Resume GERALD OPEDAL	4. Position: Information Systems Director	7. Phone Number 533-6261

REFERENCE #1 INFORMATION	
6. Reference Name Karen D. Tom	7. Phone Number (808) 537-8383
8. Title Assistant Vice President/Database Marketing Manager	
9. Organization Name Bank of Hawaii	
10. Organization Address P. O. Box 2900, Honolulu, Hawaii 96846-6000	

REFERENCE #2 INFORMATION	
6. Reference Name Chu Lan Schubert Kwock	7. Phone Number (808) 545-2442
8. Title Owner	
9. Organization Name ABC Mortgage	
10. Organization Address 918-H Smith Street Honolulu, Hawaii 96817	

REFERENCE #3 INFORMATION	
6. Reference Name Jim Steele	7. Phone Number (808) 597-3113
8. Title Senior Consultant/Professional Services Division	
9. Organization Name NCR	
10. Organization Address 720 Kapiolani Blvd., Honolulu, Hawaii 96813-5213	

**INFORMATION AND COMMUNICATION SERVICES DIVISION  
STAFF REFERENCE INFORMATION**

To be completed by Offeror. (See instructions on back of form).

OFFEROR INFORMATION		
1. Name of Offeror TITLE GUARANTY OF HAWAII	2. RFP Reference Number ICS-FY-99-22	
STAFF INFORMATION		
3. Proposed Staff Name on Resume CARLOS BUHK	4. Position Operations Manager	7. Phone Number 533-6261

REFERENCE #1 INFORMATION	
6. Reference Name Tim Farley	7. Phone Number (408) 920-0524
8. Title Public Safety	
9. Organization Name City of Sunnyvale, California	
10. Organization Address 1325 Emory Street, San Jose, CA	

REFERENCE #2 INFORMATION	
6. Reference Name Michael Packard	7. Phone Number (808) 544-1633
8. Title Chief Executive Officer	
9. Organization Name Chaney Brooks	
10. Organization Address 606 Coral Street, Honolulu, Hawaii 96813	

REFERENCE #3 INFORMATION	
6. Reference Name Maryanne Kusaka	7. Phone Number (808) 241-6300
8. Title Mayor of Kauai	
9. Organization Name 4444 Rice Street, Suite 235	
10. Organization Address Lihue, Kauai, Hawaii 96766	

**INFORMATION AND COMMUNICATION SERVICES DIVISION  
STAFF REFERENCE INFORMATION**

To be completed by Offeror. (See instructions on back of form).

OFFEROR INFORMATION		
1. Name of Offeror TITLE GUARANTY OF HAWAII, INC.		2. RFP Reference Number ICS-FY-99-22
STAFF INFORMATION		
3. Proposed Staff Name on Resume JOHN HUBBARD	4. Position Software Engineer	7. Phone Number 533-6261

REFERENCE #1 INFORMATION	
6. Reference Name Clayton M. Conrad	7. Phone Number (408) 727-2222 x. 333
8. Title Manager of Information Systems	
9. Organization Name Advantest, Inc.	
10. Organization Address 1217 Settle Avenue, San Jose, CA 95125	

REFERENCE #2 INFORMATION	
6. Reference Name Wesley K. Saito	7. Phone Number (808) 533-0592
8. Title President	
9. Organization Name Group Management, Inc.	
10. Organization Address 677 Ala Moana Blvd., Suite 714 Honolulu, Hawaii 96813	

REFERENCE #3 INFORMATION	
6. Reference Name Chris Crawford	7. Phone Number (808) 526-6753
8. Title Manager	
9. Organization Name Financial Assurance & Business Performance	
10. Organization Address Suite 350 One Waterfront Plaza, Honolulu, HI 96813	

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**INFORMATION AND COMMUNICATION SERVICES DIVISION  
STAFF REFERENCE INFORMATION**

To be completed by Offeror. (See instructions on back of form).

**OFFEROR INFORMATION**

1. Name of Offeror TITLE GUARANTY OF HAWAII, INC.	2. RFP Reference Number ICS-FY-99-22
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**STAFF INFORMATION**

3. Proposed Staff Name on Resume DEBRA PYREK	4. Position Software Engineer	7. Phone Number 533-6261
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**REFERENCE #1 INFORMATION**

6. Reference Name Janet Ellis	7. Phone Number (757) 486-1700
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8. Title  
Director, Metro Information Services

9. Organization Name  
Reflections III

10. Organization Address  
208 Golden Oak St., Ste. 150 Virginia Beach, VA 23452

**REFERENCE #2 INFORMATION**

6. Reference Name Godfrey Grier	7. Phone Number (757) 486-1700
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8. Title  
Client Services Director

9. Organization Name  
Metro Information Services/Reflections III

10. Organization Address  
208 Golden Oak Ct., Ste. 150 Virginia Beach, VA 23452

**REFERENCE #3 INFORMATION**

6. Reference Name Jack Willey	7. Phone Number (808) 944-8742
----------------------------------	-----------------------------------

8. Title  
CEO

9. Organization Name  
Interisland Systems Development and Integration (ISDI) **401128**

10. Organization Address  
1600 Kapiolani Blvd., Suite 1100, Honolulu, Hawaii 96814

Attachment C

**OFFEROR'S FINANCIALS**

Title Guaranty of Hawaii, Inc. is a privately-owned corporation. It is our policy to maintain financial statements in strict confidence. We customarily give assurance of our financial strength by providing several references. The following references can attest to our sound financial position:

Mr. Alton Kuioka, Vice Chairman & Chief Lending Officer  
Pacific Century Financial Corporation and Bank of Hawaii  
P.O. Box 2900  
Honolulu, Hawaii 96846  
Telephone number: (808) 537-8768

Mr. John Tsui, President  
First Hawaiian Bank  
P.O. 3200  
Honolulu, Hawaii 96847  
Telephone number: (808) 525-6120

Mr. Arthur Tokin, Managing Partner  
PricewaterhouseCoopers  
First Hawaiian Center  
999 Bishop Street, Suite 1900  
Honolulu, Hawaii 96813  
Telephone number: (808) 531-3414

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Attachment D  
**INFORMATION AND COMMUNICATION SERVICES DIVISION  
 CONTRACTOR REFERENCES**

To be completed by Offeror. (See instructions on back of form).

OFFEROR INFORMATION	
1. Name of Offeror TITLE GUARANTY OF HAWAII, INC.	2. RFP Reference Number ICS-FY-99-22

CLIENT #1 INFORMATION	
3. Organization Name Pacific Century Financial Corporation & Bank of Hawaii	4. Organization Address P. O. Box 2900, Honolulu, HI 96846
5. Project Name Not Applicable	6. Project Dates Start: N/A      End: N/A
7. Contact Name/Title: Mr. Lawrence Johnson Chairman & Chief Executive Officer      Phone Number: (808) 537-8220	
8. Scope of Services to be Rendered:  N/A	

CLIENT #2 INFORMATION	
3. Organization Name First Hawaiian Bank	4. Organization Address P. O. Box 3200
5. Project Name Not Applicable	6. Project Dates Start: N/A      End: N/A
7. Contact Name/Title: Mr. John Tsui President      Phone Number: (808) 525-6120	
8. Scope of Services to be Rendered:  N/A	

CLIENT #3 INFORMATION	
3. Organization Name PricewaterhouseCoopers	4. Organization Address First Hawaiian Center 999 Bishop Street, Suite 1900 Hono., HI 96
5. Project Name Not Applicable	6. Project Dates Start: N/A      End: N/A
7. Contact Name/Title: Mr. Arthur Tokin Managing Partner      Phone Number: (808) 531-3414	
8. Scope of Services to be Rendered:  N/A	

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## *Strategic Information Solutions, Inc.*

### **Company History & Vision**

Strategic Information Solutions, Inc. (SIS) was formed in March of 1986 by Dr. Philip J. Bossert as a one person, one computer consulting service to provide strategic planning and information technology planning and support services to educational institutions in Hawaii and on the mainland. Although educational institutions have remained a significant interest of SIS over the past decade, corporate clients have become the major focus of SIS's services, and information technology planning and support services have become the core business of SIS. Today, more than 30 SIS employees and a dozen contractors located in Hawaii and California provide information and telecommunication planning, design, installation, maintenance and support services to hundreds of business, government and education clients.

In October of 1996, SIS acquired the assets of General Systems Limited (GSL), a Hawaii-based computer support services company formed in 1988 by Robert C. Hardisty. SIS's strength in the area of local and wide area networking complemented GSL's strength in the areas of image and document management systems and legal accounting software. This merger — effective October 1, 1996 — also marked the entry of SIS into the area of software applications sales and support services as a compliment to its strength in the area of network design, installation and support.

Also in 1996, SIS leased a two-story office building in downtown Honolulu and consolidated its operations and those of GSL from several rented facilities. SIS invested heavily in the training of its engineers and analysts during 1996 and became a Microsoft Solutions Partner, a Novell Gold Reseller, a Banyan Systems Integrator, and an Apple Solutions Professional with two or three certified engineers and analysts in each of these network platforms.

During 1997, SIS became a reseller of the Great Plains Dynamics software and began implementation of this integrated accounting package for SIS's own operations. During the course of this implementation, SIS became familiar with another small Great Plains reseller in Honolulu — BASIC! — and eventually acquired its employees and customers in September of 1997.

SIS has become one of Hawaii's largest and most respected network systems and services companies. *SIS has expanded its operations in Hawaii from primarily serving Oahu clients to also serving clients on Maui, Hawaii and Kauai and, more importantly, to serving clients with operations on all or several of these islands.* SIS has used its "education niche" to develop over the last two years a successful educational software sales and support business in California, and is now beginning to move into other areas there such as imaging and networking. SIS recently landed a small network services outsourcing contract with Disney Entertainment and several Internet web development and support contracts. In addition to its first office in Newport Beach and a telework office in Santa Monica, which were opened in 1996, a new SIS office was opened in San Francisco in June of 1998.

### **Current Products & Services**

Prior to 1996, SIS was primarily a network systems and support services company. As a result of the growth and diversification, as well as several acquisitions which occurred during the 1996 — 1998

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period, SIS is now a full-service systems integrator providing systems and services support in the following areas:

*Network & Systems Integration* — This remains SIS's core business focus and provides support for all of the other application areas. SIS currently provides planning, design, installation, training, and support services in the areas of desktop support and wide & local area networking for education, government and business clients. SIS employees have installed over 10,000 workstations on more than 500 local and wide area networks. SIS employees currently support 5,000+ workstations (DOS, Windows, MacOS, UNIX and dumb terminals) on 300+ file, print, application and terminal servers on Novell, Windows NT, AppleShare, Banyan, and TCP/IP networks. In addition to installation only and installation plus support-on-call contracts, SIS also has several dozen "facilities management" contracts which provide regular on-site support services to clients.

*Imaging & Document Management* — SIS also sells and supports a variety of imaging & document management systems, including FileNet, Optika, Kofax, Macrosoft, OCR for Forms, and Aperture. SIS installs and supports both single product hardware/software solutions and complex solutions that require integration of two or more hardware/software systems and the development of original code to interface multiple databases and processing points. Again, as with the Network & Systems Integration Division, in addition to installation only and installation plus support-on-call contracts, SIS also has several "facilities management" contracts which provide regular weekly support services to clients on an on-going basis.

*Financial Management Solutions* — SIS is Hawaii's largest reseller of Great Plains Dynamics integrated accounting software packages. SIS is authorized to install, support and provide training for both the LAN and the CS+ SQL versions of Dynamics. SIS also provides sales and support for other Great Plains accounting packages — DOS, Windows, Mac — and is an authorized reseller for a variety of add-on packages to the Dynamics product: Intellisol, WinSoft, MatchData. Because of the expertise available in other divisions, SIS is able to offer clients initially interested in only accounting software, an integrated solution which comprises the Dynamics accounting system running on a Novell or NT network with integrated document management features.

*Internet Technology Solutions* — SIS employees have been installing and supporting Internet connectivity services to local and wide area networks for the last five years, and providing WWWeb design and development services for the last two years. SIS's president was the project manager for the design and development of the Hawaii Education & Research Network, a statewide Internet services system supporting more than 200,000 students, faculty and staff in Hawaii's public and private, higher education and K-12 educational institutions. The director of this division has extensive experience in call-center automation, on-line financial services, and ecommerce solutions. Several SIS employees played key roles in the implementation and testing of the first ethernet-over-CATV Internet services in Hawaii. SIS has full-time analysts devoted to WWWeb design and development and is also involved in several projects which use the Internet to deliver telephony and fax services to remote agents.

### **Operational Approach**

SIS is a full-service information systems solutions provider. Rather than focusing on just one solution to a customer's needs, SIS is able to offer a wide variety of options to "solve a problem or realize a

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Glenn Preus, Ltd.  
 Gordon Bierch  
 Group 70 International, Inc.  
 GTE Hawaiian Tel  
 Hawaii Dental Service  
 Hawaii Dredging & Construction  
 Hawaii Gifts Supply  
 Hawaii Medical Association  
 Hawaii Medical Service Asso.  
 Hawaii Newspaper Agency  
 Hawaiian Airlines  
 Hawaiian Host  
 Hawaiian Solo Co. Ltd.  
 Hawaiian Waikiki Beach, Inc.  
 H.E.M.I.C.  
 Heritage Research Productions  
 Honolulu Publishing Company  
 Howard Gravelle  
 Hyatt Regency Waikiki  
 Integrated Products & Software  
 Interpacific Hawaii Retail  
 Island Coffee Company  
 Island Community Lending  
 Jeff White  
 JTB Hawaii, Inc.  
 Kaneohe Yacht Club  
 Kapiolani InfoServices  
 Kappenberg, Dr. Richard (HPPG)  
 Kauai Coffee Company  
 Kauai Electric  
 Kauai Medical Group  
 Kidani & Agard  
 King's Jewelry  
 Kobayashi, Sugita & Goda  
 KTA Super Stores  
 Kualoa Ranch & Activity Club  
 Lanai Sportswear  
 Land Process Services Corp.  
 Landmark Hotels Group  
 Lange Group  
 Liberty House  
 Lynch & Farmer  
 Market Trends Pacific, Inc.  
 MaSys  
 McCabe Hamilton & Renny  
 Milici Valenti Ng Parck Advertising  
 Minami Group

Miscellaneous Customers  
 Molokai Ranch, Ltd.  
 National Micrographics Systems  
 Nautilus Subsea Adventure  
 Nezbeda  
 Nevelas, Mike @ Campbell Estate  
 Nimitz Electronic Services Corp.  
 Oceanic CableVision  
 Orthopedics Associates  
 Pacific Bell Directories  
 Pacific Harley Davidson  
 Pacific Machinery  
 Park, Kim, Yu & Remillard  
 Peck Sims Mueller, Inc.  
 Personal Mgt. Cert. & Dev.  
 Peterson & Gravelle  
 Petrospect  
 Plaza Club  
 Polynesian Cultural Center  
 Polynesian Hospitality  
 Progressive Electric Company  
 Reid Richards & Miyagi  
 Revacom, Inc.  
 Reynes Menswear  
 Rush Moore Craven Sutton Morry  
 Seafood Connection Hawaii  
 Sealife Park/Attractions Hawaii  
 Servco Pacific, Inc.  
 Skylights of Hawaii  
 Soft Warehouse  
 Stanton, Clay, Tom, Chapman  
 Tam O'connor & Henderson  
 The Law Office of J.K. Peterson  
 The Tour Shop  
 Times Supermarket, Ltd.  
 Writers & Artists Agency

*Education Clients*

American State University  
 DOE - Advanced Tech. Research  
 DOE - Hukulani Elementary School  
 DOE - Honolulu District A+ Prog.  
 DOE - TeleSchool Branch  
 DOE - Waipahu High School  
 DOE - Wheeler Intermediate School  
 Employment Training Center  
 HAIS - Academy of the Pacific

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HAIS - Damian High School  
 HAIS - Epiphany School  
 HAIS - Hanahau'oli School  
 HAIS - Hawaii Baptist Academy  
 HAIS - Le Jardin Academy  
 HAIS - Mid-Pacific Institute  
 HAIS - Navy Hale Keiki School  
 HAIS - Punahou School  
 HAIS - St. Andrew's Priory  
 HAIS - St. Elizabeth School  
 HAIS - Tokai Univ. at Honolulu  
 HAIS - Honolulu Waldorf School  
 Hawaii Assn. of Independent Schools  
 Hawaii State Public Library  
 Pacific Islands Institute  
 Pacific Regional Education Lab (PREL)  
 UH - Curriculum R&D Group  
 UH - Kapilolani Community College

**Government Clients**

American Samoa Government  
 HI - Agriculture Research Center  
 HI - Dept of Taxation  
 HI - DHS/FASD/SORO

HI - Hawaii Health Systems Corp.  
 HI - ICSD/EDP Dept.  
 HI - Office of Hawaiian Affairs  
 HI - State Procurement Office  
 HN - Board of Water Supply  
 US - Fort Shafter: Software Integr.  
 US - Graduate School, USDA  
 US - Navel Facilities Engr. Com'd.  
 US - Navy Public Works Center

**Non-Profit Clients**

Catholic Charities  
 Child & Family Service  
 Hawaii Committee for Humanities  
 Hawaii Community Foundation  
 Hawaii State Teachers Assn.  
 Hawaii Visitors Bureau  
 Holy Nativity Church & School  
 Kamehameha Schools Bishop Estate  
 Nature Conservancy of Hawaii  
 People Attentive to Children  
 Research Foundation  
 University of HI Professional Assembly

**SIS Solutions Engineers, Analysts & Consultants**

*SIS Administration*

**Philip J. Bossert • Chairman, President & CEO**

Dr. Philip J. Bossert is the Chairman, President and CEO of SIS. In addition to presiding over the growth and development of SIS since 1986, Dr. Bossert has also served as Strategic Information Systems Manager for GTE Hawaiian Tel (1987-1991); Assistant Superintendent for Information & Telecommunication Services for the Hawaii State Department of Education (1991-1994), a position in which he was responsible for the voice, data, video, and information systems serving the Department's 180,000 students and 17,000 employees at more than 300 sites on six islands; and as the Project Director for the NSF-funded Hawaii Education and Research Network project (1994-1997) a multi-million dollar national demonstration project of the Network Infrastructure for Education (NIE) program.

Prior to starting SIS, Dr. Bossert was the President of Hawaii Loa College (1978-1986), the Director of Long Range Planning for Chaminade University (1977-1978), and the Executive Director of Hawaii Committee for the Humanities (1976-1977). From 1973 until 1977 he taught philosophy as a professor at Hawaii Loa College and, since 1986, he has taught courses in strategic planning, information systems planning, and telecommunications services as a member of the affiliate graduate faculties of the

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Department of Communication and the Department of Educational Administration at the University of Hawaii.

Dr. Bossert has been a Fulbright-Hayes Scholar (1968-1970), Woodrow Wilson Fellow (1972-1973), and National Endowment for the Humanities Grantee (1976). He studied philosophy at the University of Freiburg in Germany (1968-1970) and at Louvain University in Belgium (1972). He holds a BA in Economics & Philosophy (1968) from Rockhurst College in Kansas City and an MA and Ph.D. in Philosophy (1972, 1973) from Washington University in St. Louis. He is a graduate of the Defense Language Institute (1962) in Monterey, California, and worked as an interpreter for the Army Security Agency (1962-1965) in Berlin, Germany. He also completed graduate courses in business administration and computer science (1975-1978) at the University of Hawaii. Dr. Bossert has published five books and more than thirty articles and reviews in the areas of information science, higher education administration, and philosophy. He wrote a monthly column on "Telecommunications Services" for *Information Times* magazine from 1989 to 1991, hosted a monthly television program focusing on educational technology called *TechInfo* from 1992 to 1994, and currently co-hosts a monthly television series entitled *Media Literacy*. His recent research, writing and lecturing have focused upon the social and cultural impact of information systems, strategic planning, and media literacy.

Dr. Bossert has served as a team leader, project director and regional program director for several NASA/NSF programs in Hawaii, including "Earth 2020: Visions for Our Children's Children" (1974), "Voyages into Ocean Space" (1977), and "Earth Resources Limited" (1978). He has worked as a lecturer and planning consultant for the National Association of College and University Business Officers, the National Endowment for the Humanities, Science & Human Values, Inc., the Hawaii Commission on the Year 2000, and Hawaii Public Television. He serves on the board of directors of the Pacific Telecommunications Council and is a member of the Hawaii Telecommunications Assn. He was a founding director of the Arts Council of Hawaii and the Hawaii Health Net, and a founding director and first president of the Windward Community Arts Council. He was a member of the national advisory committee of United Student Aid Funds and a founding member and the first Chairman of the Hawaii Educational Loan Program Advisory Committee (1979-1983). He has also served on the boards or advisory committees of the Hawaii Committee for the Humanities (1975-1985), the Hawaii State Hospital (1982-1985), the Hawaii Council on Economic Education (1980-1986), the Hawaii Children's Museum (1993-present), the Alliance for Arts Education (1995-present), the Friends of the East-West Center (1995-present), and Hawaii Corp. for Community Television (1997-present). He is a member of the Honolulu Rotary Club and a founding member of the Honolulu Committee on Foreign Relations.

**Robert Hardisty • Vice President - Sales & Marketing & Board Vice Chairman**

Rob Hardisty has 18 years of experience in the direct sales and marketing of high technology systems and services, including: on-line services, proprietary and UNIX-based mid-range systems, large scale networks, turn-key contract applications programming, facilities management & maintenance services, and document imaging and management services. He has had leadership roles in sales at Industry Data Services, NOVVA Computer Systems, and General Systems Limited. Rob has directly or indirectly managed over 100 network implementations, 50 or more conversions to new accounting systems, 20 or more conversions to paperless document image management systems, and several re-engineering and staff consolidation projects. He has also performed a variety of technology related studies for more than 100 organizations in government, education and business.

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**Laurence J. McCarthy • Vice President - Operations & Senior Systems Engineer**

Larry McCarthy is responsible for all aspects of SIS's technical operations, including customer contact management, network support services, and desktop application support. Prior to joining SIS, Larry was a data processing officer at First Hawaiian Bank, responsible for all technical support for the bank's 24-hour Telephone Call Center, a state-of-the-art computer/telephone application providing customer service for over 500,000 callers per month. He has also served as Vice President - MIS, for the former Hawaiian Electric Industry subsidiary, Hawaiian Insurance Group, a local property and casualty insurer, where he was responsible for all information & telecommunication systems planning and operations. Larry also worked for GTE Hawaiian Tel as a Senior Systems Engineer and was responsible for the implementation of an integrated telecommunications facilities application as part of a large federal government project in Japan. He holds a Bachelor of Science in Electrical Engineering/Computer Science from the University of Colorado and an MBA in International Business from Hawaii Pacific University.

**Bob O'Brien • Vice President - Finance & Administration**

Bob O'Brien joined SIS in 1997 when he decided to make his company, BASIC! (Business Accounting Software), a part of the SIS team. He is a principal of SIS and is responsible for all aspects of the new Financial Management Solutions Division. Bob was president and owner of BASIC! for nine years and during that time grew his company to become Hawaii's premier Great Plains accounting software and services provider. Bob is a Certified Great Plains Reseller and Implementation Specialist and has experience in all aspects — sales, training and support — of the complete Great Plains product line. He is also trained in the support of the MASS 90 accounting product line. Prior to starting his own company, Bob was president of Jamark, Inc., a computer sales and services company, and prior to that worked in a variety of sales and marketing positions. Bob holds a Bachelor of Arts in Philosophy and a Master of Arts in Religious Studies, both from the University of California at San Diego.

**Gary Rosolowich, CMA • Controller**

Gary brings to SIS more than twenty years of experience as a financial manager and consultant. He has served as the chief financial officer, vice president and president of companies in both Canada and the US ranging in size from \$20 million to \$200 million. During the last ten years, Gary has worked as a management consultant assisting corporations of all sizes with the implementation of computerized accounting and financial management systems. Projects he has been involved with included work process re-engineering, department reorganization, procedure manual development, staff training, software design. He has passed six of the NASD examinations and also the Hawaii Insurance Licensing Exam. He holds a Bachelor of Science degree in Mathematics and is a Certified Management Accountant (CMA) as well as Fellow of the Canadian Securities Institute (FCSI).

***Network & Systems Integration Division***

**Laurence J. McCarthy • Division Director**

(see bio under "SIS Administration" above)

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**Mark Lee • Manager - Microsoft Solutions & Systems Engineer**

Mark Lee is a Certified Microsoft Systems Engineer and a Novell Netware Administrator. Since joining SIS, Mark has been responsible for managing the Microsoft Solution Provider (MSP) program and provides a wide range of customer services in connection with the program, including site survey,

network design, system installation & configuration, as well as on-going maintenance and trouble-shooting. Prior to joining SIS, Mark spent several years at Bank of Hawaii as a systems engineer and managed BOH's Branch Automation Project. Mark earned his BA in Accounting as well as an MBA in Finance/Management Information Systems from University of Hawaii. He was also employed by UH for three years as the manager of the business school's computer labs. Mark's experience as a systems engineer is broadly based and he works confidently in a variety of network environments: Windows NT, Window's 95, Windows for Workgroups, Novell 3.11 and 4.1, UNIX, and more.

**Timothy Mondoy • Manager - Novell Solutions & Systems Engineer**

Tim Mondoy is a Certified Novell Netware Engineer and a Certified Novell Netware Administrator. Tim has more than nine years of LAN and twelve years of PC support experience. His expertise includes LAN design, installation and support and he has been responsible for several major network systems conversions. Tim currently supports a wide range of Novell based networks, including Netware 3.11, 3.12 & 4.1, Windows 95, Windows for Workgroups, Windows 3.1, and both the DOS and Windows' versions of Novell GroupWise. He is familiar with Ethernet 10baseT and Token Ring LAN topologies. Prior to joining SIS, Tim was with The Computer Team for four years as a consultant and earlier worked as a LAN support specialist for Bank of America in San Francisco for five years.

**Charles Adams • Systems Engineer**

Chuck is a Certified Novell Netware Engineer and a Certified Novell Netware Administrator, as well as a Certified Microsoft Systems Engineer. Chuck has over 25 years of technical support experience with emphasis on local area networking, electronic mail, and Internet-based access. He has an extensive background in technical support, planning, training, integration and trouble-shooting. Prior to joining SIS, Chuck was employed by the Hawaii Department of Education (DOE) Office of Information and Telecommunication Services - Advanced Technology Research Section. While working with the 243 schools in the DOE, he developed the technical and organizational skills required for technology needs assessment, planning, implementation, support, training and evaluation. Chuck holds a Bachelor of Science in Mathematics, a certificate in Telecommunication & Information Resource Management, and Microsoft product certificates for Windows NT, Windows 95, and MS Mail.

**Stanley Kurasaki • Systems Engineer**

Stan Kurasaki is a Microsoft Product Professional and a Certified Novell Systems Administrator. He has many years of networking and desktop support experiences as well as systems programming. Stan joined SIS in 1995 and was assigned as the leader of the deployment team assisting GTE Hawaiian Tel with its LAN conversion from 3Com to Banyan. Stan is familiar with Novell, Microsoft, Unix, Banyan, and SunMicro Systems products; he also has used many different programming languages, such as C, C++, Pascal, COBOL, LISP, Prolog, Assembly Intel, Access, and FoxPro. Prior to joining SIS, Stan worked as a programmer at GTE Hawaiian Tel for about a year, and also worked at University of Hawaii's computer Lab for many years. Stan holds a Bachelor of Science in Information and Computer Science from University of Hawaii.

**Russell Houlton • Systems Engineer**

Russell holds a Bachelor of Science in Electrical Engineering from the University of Hawaii at Manoa and has 15 years of experience in the field of information technology systems and services. He worked as an Audio-Visual Engineer at the East-West Center in the design and installation of large scale A/V systems for conference rooms and lecture halls, and as both a Programmer and a Field Services Engineer for Advanced Information Systems, where he maintained minicomputers and microcomputer

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workstations. Russell's most recent experience (1985-present) has been as the Senior Field Services Engineer for General Systems Limited. In this position, he has been responsible for a wide variety of hardware and software related activities including: installation and maintenance of minicomputers and super-minicomputers and related peripheral equipment, component-level trouble-shooting and repair of failed systems, optimization and systems administration of both mini- and microcomputer systems, and installation & configuration of optical drives, scanners and networks. Russell is active in his church and enjoys photography, hiking, travel and music.

**Alan Renshaw • Systems Engineer**

Alan is a senior systems engineer who has worked for SIS for many years both in Hawaii and in his home town of Santa Monica, CA. He has also worked as an independent multi-media consultant, producer and trainer. Alan was the primary systems engineer on the design and implementation of a local area network based, interactive video-on-demand system for a Hawaii client, and currently provides both on-site local area network support and on-line remote agent network support for the Disney Studios Film Entertainment IS Division in California. And, he was the producer of a successful independent film that has won acclaim at film festivals across the US. Alan holds a Bachelor of Science in Computer Science from U.C. Berkeley.

***Imaging & Document Management Division***

**Robert Hardisty • Division Director**

(see bio under "SIS Administration" above)

**David Offerman • Imaging & Document Management Solutions Consultant**

David has almost two decades of experience in the field of information systems, in particular in the areas of document imaging and process automation for mid to large scale businesses. Prior to joining SIS, David worked for UniMic and Records Management Hawaii, Inc., where he was responsible for all sales and marketing activities related to imaging and document management systems. Prior to this, David was responsible for outside sales at EMA Office Systems, held programming and systems analyst positions with Bank of Hawaii and Interwest Bank of Colorado, and was an operations manager for McDonnell-Douglas Automation Company. He is Master of Information Technology Certified and currently serves on the executive board of A.I.I.M., Hawaii Chapter, and the Navy League, Honolulu Council.

**Jaime D. Salamanca • Systems Analyst**

Jaime came to SIS along with the rest of the GSL team. He has almost ten years in the computer support services business and has installed and repaired a wide range of hardware systems. He has specialized in recent years in supporting the terminals, scanners and printers that are associated with imaging and document management systems.

**Kevin Johnson • Internet Technology Solutions Consultant**

Kevin Johnson was brought into SIS in 1997 to develop and manage the newly formed Internet Technology Solutions Division. Kevin brings extensive experience to this task, having developed and managed all aspects of the Internet-based TeleSales & PC Home Banking Center at First Hawaiian Bank before joining SIS. Prior to this he worked as the Operations & Technical Manager for the First Hawaiian Bank Call Center, where he managed a staff of 71 to handle more than six million calls annually, and as the Operations Manager for the First Interstate Bank of Hawaii Dealer Center. Kevin has experience both on the sales and marketing side of the house and on the technology integration side,

with knowledge of local and wide area data and telephony networks, PBX and call center systems automation, and software development. He is certified in the Syntellect Interactive Voice Response system, the NORTEL Meridian Max ACD Workforce Management software, and in the Early Cloud TeleServicing Control System.

**Blair Renshaw • Manager - Internet Solutions**

Blair has worked on a variety of projects at SIS since 1991 and is currently the principal senior systems analyst in charge of developing SIS's new Internet services division. In addition to serving as the project manager in Hawaii for the design and implementation of a local area network based, interactive video-on-demand system, Blair has also designed a large number of specialized interactive databases and WWW sites for a variety of customers in California. Blair also spends much of his time working as a professional trainer, showing others how to work successfully with interactive multi-media technologies such as ShockWave, Director, Explorer, Netscape, and others. Blair holds a Bachelor of Arts in Political Science from U.C. Santa Cruz.

**Maile Loo • Interactive MultiMedia Consultant**

Maile is a former SIS systems analyst who left several years ago to form her own consulting company, TEKnowledgeY Design Corp., a business focusing on interactive multimedia solutions for education and business. She has worked on a variety of CD-ROM/Video projects including: "Hyperwaa!" Interactive Japanese Language software for the Dept. of Education; "Ride the Wild Net: A Beginner's Guide to the Internet" with Andy Bumatai; and "Ho'omau" CD-ROM Oral History Series (set of 16 CD-ROMs) for the Dept. of Education. Maile also has been actively involved in the design, delivery and assessment of several recent educational technology programs. She serves as an educational technology and strategic planning consultant for the Pacific Region Educational Lab (PREL) and assisted with the implementation of the Kamehameha School's first K-12 staff development program in technology. Ms. Loo holds a Bachelor of Science in Artificial Intelligence from Stanford University and serves on the Board of Directors of the Chinese Chamber of Commerce and the Executive Board of EDTECH, Hawaii.

***Financial Management Solutions Division***

**Bob O'Brien • Division Director**

(see bio under "SIS Administration" above)

**Gary Rosolowich, CMA • Financial Solutions Analyst**

Gary brings to SIS more than twenty years of experience as a financial manager and consultant. He has served as the chief financial officer, vice president and president of companies in both Canada and the US ranging in size from \$20 million to \$200 million. During the last ten years, Gary has worked as a management consultant assisting corporations of all sizes with the implementation of computerized accounting and financial management systems. Projects he has been involved with included work process re-engineering, department reorganization, procedure manual development, staff training, software design. He has passed six of the NASD examinations and also the Hawaii Insurance Licensing Exam. He holds a Bachelor of Science degree in Mathematics and is a Certified Management Accountant (CMA) as well as Fellow of the Canadian Securities Institute (FCSI).

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**Amanda Crabtree • Financial Solutions Analyst**

Amanda joined SIS in 1998 as a Great Plains Dynamics trainer and customer service representative. Prior to joining SIS, Amanda worked for nine years with First Hawaiian Bank's BankCard Operations group, initially as a customer service representative and eventually as Assistant Supervisor. Her experience at First Hawaiian includes training, procedures documentation, management of day-to-day operations for the credit card and bill payment departments, and software upgrade project management.

**Jim Gibbs • Financial Solutions Analyst**

Jim Gibbs is a Certified Dexterity Developer for the Great Plains accounting products line and is also SQL Administration certified. He is responsible for all of the custom interface and database programming that are required to make a standard accounting system like Great Plains Dynamics fit in with the information systems which already exist in most companies. Jim has more than ten years in the computer business and, prior to focusing his attention on the support of accounting software, wrote and successfully marketed several commercial software packages.

*Education & Non-Profit Solutions Division*

**Dr. Philip Bossert • Division Director**

(see bio under "SIS Administration" above)

**Christina Shioi • Education & Non-Profit Solutions Consultant**

Chris brings a strong background in the planning and management of educational technology to her work at SIS. She has been a teacher, a school technology coordinator, a technology resource specialist in Hawaii State Dept. of Education's Advanced Technology Research Group. She has considerable experience in technology training, having provided many one-on-one training sessions, a large number of group workshops for teachers and administrators, as well as hosting her own statewide CATV educational technology program as an Electronic School Facilitator. Chris holds a Bachelors degree in Elementary Education from the Univ. of Northern Colorado, a Masters degree in Educational Technology from the University of Hawaii, and is currently completing an MBA at Hawaii Pacific University.

**Karen Lugo • Education & Non-Profit Solutions Analyst**

Karen has been with SIS as a systems analyst almost from the beginning. As one of SIS's key support resources, she provided end-user network and desktop support and training for end users at GTE Hawaiian Tel for six years. She was also a member of the GTE Hawaiian Tel 3Com to Banyan LAN conversion team. She is a trained and experienced Novell Systems Administrator and has assisted with LAN design, installation and support for many of SIS's clients. Karen has extensive experience with Macintosh computer systems and formed Hawaii's first Apple User Group for Educators. She has also designed numerous custom databases using 4th Dimension, FileMaker Pro, Dbase, and FoxPro. Karen has been a Honolulu Community College instructor in computer graphics, page layout, multimedia, and data communication courses since 1988. She holds an Associate of Science degree in Information & Computer Science, a Bachelor of Arts degree in Humanities with emphasis in English, and a Master of Arts in Communication, all from the University of Hawaii.

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**Jennifer Cassi • Education & Non-Profit Solutions Analyst**

Jennifer has been with SIS for two years and is a key resource in the support of SIS's education and non-profit sector business. The programs in which she is trained and provides support include applications specific to the education and non-profit sector — MacSchool & WinSchool, Library Pro, GiftMaker & EventMaker — as well as software packages of a more general nature: MS Word, FileMaker Pro, MS Excel, and Windows. She supports both the Intel and Macintosh platforms as well as the Novell, Microsoft, and Apple network environments. Prior to joining SIS, Jennifer worked as a trainer and manager at Blockbuster.

**Sharen Arakaki • Education & Non-Profit Solutions Consultant**

Sharen joined SIS as an SIS Education Solutions Manager working out of the SIS Minnesota office, but she has developed quite a reputation for her extensive knowledge of Internet applications in K-12 curricula and is on the road quite often doing workshops and speaking at conferences across the country. Sharen has been a special education teacher in the California school system and a science teacher in the Hawaii school system. Prior to joining SIS, she worked as an education technology specialist for the Hawaii Department of Education's (DOE) Advanced Technology Research Group. From 1992 - 1994, Sharen was the project manager for the Hawaii DOE's "National and International Network Services in Distance Education" (NINSDE) pilot project, the results of which eventually lead to the development of the proposal for the HERN project, a 3-year, multi-million dollar national demonstration project of the NSF's Networking Infrastructure for Education (NIE) initiative. She is also responsible for reformatting and delivering credit bearing staff development courses which integrate live CATV broadcasts, on-line collaboration, and face-to-face practices. Between 1989 - 1991, Sharen was responsible for implementing the statewide staff development program for utilizing the State of Hawaii's first statewide telecommunications network for education and public access to government services: *Hawaii FYI*. Sharen holds a Bachelor's in Education degree from the University of Hawaii, as well as graduate level certificates in Telecommunication and Information Research Management from the University of Hawaii and Learning Disability (K-12) and Multiple Subjects for K-9 from Sonoma State University.

**SIS Systems Technicians & Operators**

In addition to the certified professional staff, SIS also employs more than a dozen full- and part-time personnel who operate computing, scanning, imaging, CAD, and networking hardware and software for SIS and its customers. These employees also provide hardware maintenance & repair, as well support the SIS helpdesk.

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**RFP No. ICS-FY-98-nn**  
**TECHNICAL POINT RESPONSE WORKSHEET**

RFP Specification	Cross Reference Location in Offeror's Proposal
3 SCOPE OF WORK .....	<u>Section III</u>
3.1 GENERAL STATEMENT .....	<u>Section III</u>
3.2 PRIMARY OBJECTIVE .....	<u>Section III</u>
3.3 CHARACTERISTICS OF THE NEW LCAT AND REGULAR SYSTEM .....	<u>n/a</u>
3.4 THE CURRENT ENVIRONMENT .....	<u>n/a</u>
3.5 ENHANCEMENTS .....	<u>n/a</u>
3.6 IMAGING REQUIREMENTS .....	<u>Section III</u>
3.6.1 General Imaging Requirements .....	<u>Section II</u>
3.6.2 Imaging Database .....	<u>Section III</u>
3.6.3 Optical Character Recognition .....	<u>Section III</u>
3.6.4 Optical Scanner Requirements .....	<u>Section III</u>
3.7 GENERAL NETWORK REQUIREMENTS .....	<u>n/a</u>
3.8 UNIX SERVER .....	<u>n/a</u>
3.9 REMOTE ACCESS REQUIREMENTS .....	<u>n/a</u>
3.10 IMPLEMENTATION PLAN .....	<u>Section III</u>
3.10.1 Phase 1: Enhancement of the Land Court Systems ..	<u>n/a</u>
3.10.2 Phase 2: Implementing a BOC network .....	<u>n/a</u>
3.10.3 Phase 3: Implementing Imaging Capability .....	<u>Section III</u>
3.10.4 Phase 4: Implementing remote access to BCIS .....	<u>n/a</u>
3.11 WORK PLAN .....	<u>Section III</u>
3.11.1 Phase 1 Work Plan .....	<u>n/a</u>
3.11.2 Phase 2 Work Plan .....	<u>n/a</u>
3.11.3 Phase 3 Work Plan .....	<u>Section III</u>
3.11.4 Phase 4 Work Plan .....	<u>n/a</u>
3.11.5 Tasks Common to All Phases .....	<u>n/a</u>
3.12 PROJECT MANAGEMENT .....	<u>Section IV</u>

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**RFP No. ICS-FY-98-nn  
TECHNICAL POINT RESPONSE WORKSHEET**

**RFP Specification** **Cross Reference Location  
in Offeror's Proposal**

3.13	CONTRACTOR STAFFING .....	<u>Section IV</u>
3.13.1	Contractor Employees .....	<u>Section IV</u>
3.13.2	Subcontractor Staffing .....	<u>Attachment E</u>
3.14	GENERAL REQUIREMENTS .....	<u>Section III</u>
3.14.2	Weight Requirements .....	(* see below)
3.14.3	Power Requirements .....	
3.14.4	Operational Environment .....	
3.14.5	Additional Configuration Features .....	
3.14.6	Quality of Equipment .....	
3.14.7	Delivery .....	
3.14.8	Installation .....	
3.15	SERVICE AND SUPPORT PERSONNEL REQUIREMENTS. ....	
3.16	HARDWARE MAINTENANCE REQUIREMENTS .....	
3.16.1	Diagnostic Tools and Test Equipment .....	
3.16.2	Periods of Maintenance Service .....	
3.16.3	Preventative Maintenance .....	
3.16.4	Remedial Maintenance .....	
3.16.5	Predictive Maintenance .....	
3.16.6	Replacement Parts .....	
3.16.7	Safety Devices .....	
3.16.8	Parts Availability .....	
3.16.9	Engineering Changes .....	
3.16.10	Equipment Modifications .....	
3.16.11	Hierarchy of Support .....	
3.16.12	Maintenance Reports .....	

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**RFP No. ICS-FY-98-nn  
TECHNICAL POINT RESPONSE WORKSHEET**

**RFP Specification**

**Cross Reference Location  
in Offeror's Proposal**

3.17	SOFTWARE MAINTENANCE REQUIREMENTS .....	(* see below)
3.17.1	Error Correction .....	
3.17.2	Updates .....	
3.17.3	Hotline Service .....	
3.17.4	Withdrawn Software .....	
3.17.5	Response Times .....	
3.18	SOFTWARE TERMS AND CONDITIONS .....	
3.18.1	Grant of License .....	
3.18.2	Use And Protection Of Software .....	
3.18.3	Other Software Requirements .....	
3.18.4	Warranty .....	
3.19	TIME OF PERFORMANCE .....	Section III
3.20	ACCEPTANCE PROCEDURE .....	(* see below)
3.20.1	Criteria for Acceptance Test .....	
3.20.2	Review of Acceptance Test .....	
3.21	TRAINING .....	
3.22	DELIVERABLE PRODUCTS AND SERVICES .....	
3.23	POST IMPLEMENTATION SUPPORT .....	
3.24	MAINTENANCE OF OFFICES .....	

Note:

\* Requirements to be provided before final acceptance of this proposal.  
Requirements have been read; no significant problems are foreseen

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