



Beloit
WISCONSIN

REQUEST FOR PROPOSAL
of Computer Assisted Mass Appraisal (CAMA) Software

ISSUED: May 06, 2019
DUE DATE: July 08, 2019, 4:00 PM (CDT)

CITY OF BELOIT

Request for Proposal of Computer Assisted Mass Appraisal (CAMA) Software

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Project Coordinator:

Eric R. Miller

City of Beloit – Finance & Administrative Services Director

100 State Street

Beloit, WI 53511

Office Phone: (608) 364 – 6676

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E-Mail Address: millere@beloitwi.gov

A. Purpose of Request

The City of Beloit (City) is requesting proposals for the purpose of obtaining a Computer Assisted Mass Appraisal (CAMA) software system and related implementation services to replace the current CAMA software system. All aspects of this request for proposal will be in accordance with the City's procurement policy.

The City reserves the right to reject any and all proposals. The contract will be awarded in accordance with the terms and conditions of the procurement policy and the contract shall comply with sections G and J of this request for proposal. This solicitation may be canceled if doing so is determined to be in the best interest of the City. Upon award of the contract all submitted documents become subject to the open records law of the State of Wisconsin.

B. Time Schedule

The City intends to procure the CAMA software in accordance with the following schedule. The City reserves the right to modify or change any part of this schedule, as necessary. The City will also entertain any recommendations regarding its planned schedule for implementing the new system.

Release RFP to Vendor	Monday May 06, 2019
Vendor Questions Due to City	Friday May 31, 2019
Proposal Responses Due	Monday July 08, 2019
Reference Checks, Vendor Visits, & Product Demos	July – August 2019
Finalist(s) Selected	End of September 2019
Award Contract	End of October 2019
Project Commencement	November 2019
System Go-Live	January 2021

C. Proposal Provisions/Instructions to Firms

1. All responses must be addressed to, and mailed or delivered to:

City Clerk/Treasurers Office
100 State Street
Beloit, WI 53511

2. If additional information is needed to interpret the specifications/requirements, written questions should be directed to the project coordinator: Eric Miller at the address stated on page 1. All questions must be in writing and received by 4:00 P.M. CDT on Friday May 31, 2019.
3. It is the responsibility of all firms to carefully read the entire RFP which contains provisions applicable to successful submission and completion of the proposal.

4. All proposals must be typewritten and shall be delivered in a sealed envelope or other USPS approved container and clearly marked in the lower left corner: "CAMA Software and Services". All proposals must be received by 4:00 P.M. CDT on Monday July 08, 2019. **Proposals received after that date and time will be rejected.** Actual receipt is required by that time. Postmarked envelopes will not be sufficient. Submittals by fax or E-mail are not acceptable and will be rejected. Proposals will not be opened publicly.
5. Please submit three (3) hard copies of the proposal along with one (1) electronic copy (CD, DVD, or USB) in MS Word. PDF may be used for non-essential material such as brochures or other non-required material. Proposals shall be signed and dated by an official authorized to bind the firm in legal matters.
6. The RFP does not commit the City to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or contract for services of software. The City reserves the right to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety this RFP if it's in the best interest of the City to do so.
7. The City further reserves the right for itself and any of its agents or contractors to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal. The City reserves the right to share the RFP and any subsequent vendor provided information with any consultant of the City's choosing in order to secure an expert opinion, and to make copies of proposals for evaluation purposed or as required for legal compliance.
8. Amendments:
 - a) By City: This RFP may be amended by the City in response to the need for further clarification, specifications and/or requirements, changes, new due date, etc. Amendments will be posted on the City of Beloit website <https://www.beloitwi.gov/>.
 - b) By Firm: After receipt by the City, proposals may only be amended by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the proposal response due date unless requested by the City.
9. Any proposal may be withdrawn up until the date and time set above for the response due date. Proposals shall remain firm once submitted and may not be withdrawn for a period of 120 days.
10. All submitted proposals become the property of the City and information included therein or attached thereto shall become public record after recommendation for endorsement of contract is made. All materials provided to the City by the respective Firm are subject to State of Wisconsin public disclosure laws. Any information contained in the proposal that a Firm desires to claim as proprietary and exempt from disclosure must be clearly designated, including identifying the page and particular exception(s) from disclosure. The City will try to respect all material identified as being confidential. Marking the entire proposal as proprietary or confidential, and therefore, exempt from disclosure will not be accepted or honored and may result in disclosure or disqualification of the entire proposal at the discretion of the City. Public disclosure laws will take precedence if information is publicly available or required to be disclosed by court order or other governmental entity.

11. All attachments, additional pages, addenda, or explanations supplied by the firms with this RFP shall be considered as part of the proposal response.

D. Entity Overview

The City of Beloit is located in Rock County Wisconsin. The City covers approximately 17 square miles and has a population of 36,520 residents as well as more than 90 industrial firms, several corporate headquarters, seven (7) active TIF Districts, and a minor league baseball team.

Beloit provides a full range of services typical of municipal governments, including police, fire, and emergency medical protection; public works functions such as street maintenance, refuse and recycling collection, water, wastewater, and stormwater collections; parks and leisure services; community development services including planning and code enforcement; economic development; and general and financial administration.

Assessment Department

The City of Beloit’s assessment department, when fully staffed, consists of one (1) full time Property Appraiser, one (1) full time Assessment Technician, and one (1) contracted assessor to fulfill the statutory filing requirements.

The 2018 Equalized Value (including manufacturing and TID) for the City was \$1,650,289,200. The assessment ratio for 2018 was 0.9715.

The City has the following parcel counts (from 2018 Statement of Assessment):

	<u>Total Land</u>	<u>Improvements</u>
Residential	11,953	11,472
Commercial	742	625
Manufacturing	67	65
Agricultural	97	0
Undeveloped	2	0
Agricultural Forest	0	0
Forest Lands	0	0
Other	<u>0</u>	<u>0</u>
Total	12,861	12,162

Personal Property Accounts in 2018 roll were 733. The last City-wide market revaluation was completed in 2009. The last City-wide market revaluation was completed in 2009.

E. Budgetary and Technology Information

The City’s 2019 adopted budget of approximately \$96.8 million includes approximately \$11.5 million for capital improvements. The remaining \$85.3 million funds the municipal services listed in the preceding paragraph. The City prepares a comprehensive budget document, including both operating and capital

budgets, which is adopted by the common council in November for the subsequent fiscal year. The budget document is available for review on the City's website at <https://www.beloitwi.gov/>.

The City utilizes the following technology resources – for reference purposes only:

1. Network Environment
 - a) Switched 10/100/1000 Mb Ethernet to the desktop.
 - b) Power over Ethernet.
 - c) 1 Gigabit Ethernet backbone over fiber optic cable.
 - d) High traffic hosts are Gigabit attached.
 - e) TCP/IP Protocol is currently supported.
 - f) Point-to-point wireless.
2. Desktops Standard
 - a) Desktops and Laptops with Windows 7 or Windows 10.
3. Mobile Devices
 - a) Supports iPads, iPhones, and Android Smartphones.
4. Servers Standard
 - a) Windows 2016 on VM Ware and Cisco B-Series.
5. Directory Services
 - a) Active Directory through LDAP.
6. Application Software – Third Party Application Software Products
 - a) Tyler MUNIS Version 11.3.
 - b) ESRI ArcGIS.
 - c) Laserfiche Document Management Software.
 - d) Apex Software Apex Sketch – Supplied by current CAMA vendor.
 - e) Marshall & Swift Commercial Estimator – Supplied by current CAMA vendor.

F. Scope of Project

The purpose of this software selection project is for the procurement of a Computer Assisted Mass Appraisal (CAMA) solution containing the following required functionality:

1. Property Management Functions
2. Sales Analysis
3. Valuation System
4. Integration
5. Inquiry Functions
- 6) System Defined Reports
- 7) User Defined Reports and Queries
- 8) System Setup and Administration

G. Contract Terms and Conditions

The following contractual conditions shall be included in the contract entered into by the City and the successful Firm:

Insurance Requirements

The successful Firm shall not commence work under this contract until all insurance required under this section is obtained, nor shall the Firm allow any subcontractor to commence work on their subcontract until all insurance requirements have been obtained. The following are required minimum insurance coverages:

1. Workers Compensation complying with applicable statutory requirements.
2. Comprehensive General Liability - \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
3. Professional Liability Coverage - \$1,000,000 per occurrence and in aggregate.
4. Automobile Liability - \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
5. Excess/Umbrella Liability - \$2,000,000 over the General Liability and Automobile Liability Coverages.

Proof of Insurance

1. The Firm shall furnish a Certificate of Insurance, naming the City as an additional insured, countersigned by a Wisconsin Resident Agent or Authorized Representative of the insurer indicating that the Firm meets the insurance requirements identified above.
2. The Certificates of Insurance shall include a provision prohibiting cancellation of said policies except upon (30) days prior written notice to the Director of Finance and Administrative Services and specify the name of the contract or project covered.
3. The Certificate of Insurance shall describe the contract by name and or identification number in the "Description of Operations" section of the form.

Applicable Law

Except as otherwise specifically provided herein, this contract shall be governed by and construed according to the laws of the State of Wisconsin. The Firm shall comply with all local, state, and federal laws and regulations applicable to this contract and applicable to the goods and services provided under this contract.

Termination of Contract

The City may, for its convenience, terminate this contract at any time by a notice in writing from the City to the Firm by certified mail. If the contract is terminated by the City as provided herein, the Firm shall be paid an amount which bears the same ratio to the total compensation as the services actually performed bear to the total services of the Firm covered by this contract, unless payment of compensation have previously been made.

Dispute Resolution

If a dispute related to this agreement arises, all parties shall attempt to resolve the dispute through direct discussions and negotiations. If the parties cannot resolve the dispute and if all parties agree, it may be

submitted to either mediation or arbitration. If the matter is arbitrated, the procedures of Chapter 788 of the Wisconsin Statutes or any successor statute shall be followed. If the parties cannot agree to either mediation or arbitration, any party may commence an action in the Circuit Court of Rock County. If a lawsuit is commenced, the parties agree that the dispute shall be submitted to alternate dispute resolution pursuant to Section 802.12, Wis. Stats., or any successor statute. Unless otherwise provided in this contract, the parties shall continue to perform according to the terms and conditions of the contract during the pendency of any litigation or other dispute resolution proceeding.

The parties further agree that all parties necessary to the resolution of a dispute (as the concept of necessary parties is contained in Chapter 803, Wisconsin Statutes, or its successor chapter) shall be joined in the same litigation or other dispute resolution proceeding. This language relating to dispute resolution shall be included in all contracts pertaining to this project so as to provide for expedient dispute resolution.

Change Orders

The scope of the services to be performed under this contract may be amended or supplemented by mutual written agreement between the parties to the contract. This amendatory provision shall not operate to prevent the City from exercising its reserved right to establish reasonable time schedules of and for any of the work or services to be performed by the Firm hereunder, nor to cancel any of the services not performed at the time notice is given to the Firm of the cancellation of such services or portion of the work to be performed hereunder.

Gratuities and Kickbacks

It shall be unethical for any person to offer, give, or agree to give any elected official, employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer for employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the contents of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceedings or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or contract, subcontract, or any solicitation or proposal therefore.

It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or a higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract, or order.

Mutual Indemnification/Hold Harmless

The Firm agrees to release, indemnify, defend, and hold harmless the City, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and reasonable attorney's fees, which may be sustained or to which they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of Firm's officers, officials, employees, agents, or assigns.

The City hereby agrees to release, indemnify, defend, and hold harmless the Firm, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and

reasonable attorney's fees, which may be sustained or to which they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of City officers, officials, employees, agents or assigns. The City does not waive, and specifically reserves, its rights to assert any and all affirmative defenses and limitations of liability as specifically set forth in Wisconsin Statutes, Chapter 893 and related statutes.

Nondiscrimination Policy/Equal Opportunity Employment

In connection with performance of work under this contract the Firm agrees that all vendors who provide goods and services to the City by contract, shall, as a condition of providing goods and services, adhere to all Federal, State, and Local laws, ordinances, rules and regulations, and the City's Affirmative Action/Equal Opportunity policy, and not discriminate against persons to be served or an employee or applicant for employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment because of race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individuals ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation.

Statement of Compliance

The Firm has carefully reviewed the City's required contract language, as set forth in the RFP pertaining to termination of contract, change orders, gratuities and kickbacks, hold harmless/indemnification, insurance requirements and proof of insurance, dispute resolutions, and is in full compliance with all statement and requirements. This contract language is incorporated herein by specific reference as if set forth in full. Any statements set forth in this contract document that conflict with the City's contract language are superseded by the City's required contract language.

Assignment or Subcontract

This contract may not be assigned or subcontracted by the Firm without the written consent of the City.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same of any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Force Majeure

The term Force Majeure shall include, with limitation by the following enumeration: acts of God or Nature; acts of civil or military authority; terrorism; fire; accidents; pandemic outbreaks; power shortages; telecommunication or data communications; shutdowns for purposes of emergency repairs; strikes and any other industrial, civil or public disturbances that are not reasonably within the control of a Party, causing the inability to perform the requirements of this contract. If any Party is rendered unable by a Force Majeure, to perform or comply with any obligation or condition of this contract then, upon giving notice and reasonably full particulars to the other Party, such obligation or condition shall be suspended only for the time and to the extent reasonably necessary to allow for performance, compliance and restoration of normal operations. If only the Firm is impacted by Force Majeure and more than 60 days has elapsed then the City shall be entitled to exercise any remedies otherwise provided for this contract, including termination or default.

Warranty

A warranty is sought for both the software and implementation services.

Software:

1. The selected Firm will warrant that the proposed software will conform in all respects to the requirements and specifications as stated in the RFP, except for minor or inconsequential errors. Specifically, the detailed requirements as state in this RFP will become part of the selected Firm's contract and will be warranted as such. Any repairs or "bug fixes" required during this period will be made at no expense to the City.
2. The selected Firm must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional requirements as included in this RFP.
3. State that the warranty, at a minimum, should be valid for the duration of the implementation and for a minimum of one (1) year after final acceptance of all modules/suites/applications included in the implementation. The City will look more favorably at Firms with warranty periods longer than the minimum specified herein.
4. The Firm should describe the software warranty for the software quoted, identify all coverage points, and specify when the warranty period begins and ends.

Implementation and Professional Service:

1. The City expects a warranty for implementation and professional services (e.g. work products, developed modifications, and system configuration) for a minimum of one (1) year after the final acceptance (configuration phase) date of the respective modules, except for minor or inconsequential items. It is assumed that Firms have priced their services to include these warranty provisions. The extent of the warranty coverage will be evaluated as part of the overall procurement process.
2. The Firm should state the implementation services warranty for the software quoted, identify all coverage points, and specify when the warranty period begins and ends.
3. The Firm should specify what costs for repairs the City may be responsible for while the system is under warranty (e.g. labor, travel expenses, parts, etc.).

Payment and Performance Guarantee

The City would like to have some retainages and means for software and vendor performance assurance, and as such, proposes the following payment schedule:

- 25% upon signing and execution of the contract
- 25% upon successful installation and acceptance of initial software functionality
- 25% upon accepted first conversion of existing data and testing of interfaces
- 15% upon completion of training and system ready for Go-Live with current data conversion
- 10% upon final acceptance 60 days after Go-Live for outstanding issues to be corrected, payment will not be made until City and Firm agree that outstanding items have been resolved.

Renewal Costs

Regardless of whether or not the City purchases a product that is installed on our network or purchase a hosted solution that runs at a vendor's website, we expect to control the annual renewal increases. Our contract with the successful bidder will include a stipulation that the annual support or lease costs cannot

increase at all in the first 3 years and thereafter cannot increase more than the previous year’s consumer price index + 1%. If the Firm cannot accept this stipulation please clearly state what the proposed cap would be for the automatic renewal process when responding to the RFP.

Acceptance of Terms and Conditions

Submission of a proposal shall constitute acknowledgment and acceptance of all the terms and conditions contained in this RFP. The selected Firm(s) will be required to enter into a formal contract with the City.

H. Technical Proposal Requirements and Format

In order for the City to adequately compare proposals and evaluate them uniformly and objectively, all proposals must be submitted according to the following format. Each proposal should be assembled including a table of contents and be separated by section and tabbed with the proposal heading.

Your proposal should provide a straightforward and concise description of the proposed software and services and your ability to deliver the same. Emphasis should be on completeness and clarity. Unnecessarily elaborate brochures, artwork or other presentations beyond that sufficient to present a complete and effective proposal is not desired.

SECTION	TITLE	CONTENTS
Section 1	Cover Letter	The Transmittal letter should be: <ul style="list-style-type: none"> • On your letterhead. • Signed by an official in your organization authorized to bind the firm to all statements, including services and prices, contained in the proposal. • State the length of time the proposal terms remain firm, which must be for a minimum of 120 days from the proposal due date (unsigned letters will cause rejection of the proposal).
Section 2	Table of Contents	The table of contents of the proposal should include a clear and complete identification of the material submitted by section and page number.
Section 2	Executive Summary	Complete the Software Vendor Executive Summary Response Chart from Exhibit A – Required Vendor Information of this RFP.
Section 3	RFP Exceptions	Complete the Exceptions Form (see Exhibit B) and include it in this section. Identify ALL exceptions to this RFP, including contract terms and conditions, and proposed payment schedule.
Section 4	Scope of Services	Include a general discussion of the Firm’s understanding of: <ul style="list-style-type: none"> • Overall project. • Scope of work proposed. • Proposed version of your product, when it was released for general availability and how many customers (not users or locations) are installed on the proposed product and version proposed.

		<ul style="list-style-type: none"> • Summary of the features of your proposed software product. • Summary of any other modules or services that you offer that you feel that we should be aware of.
Section 5	Functional Requirements	<p>Please include the following in this section of your proposal:</p> <p>1. A brief summary of the functionality that your software has for the following:</p> <ul style="list-style-type: none"> • Property Management Functions. • Sales Analysis. • Valuation System. <ul style="list-style-type: none"> - Land - Residential - Commercial - Exempt - Manufacturing/Industrial - Personal Property - Mobile Home • Integrations. • Inquiry Functions. • System Defined Reports. <p>2. Completed Functional Requirements Document from Exhibit C.</p>
Section 6	Contract Terms & Conditions	<ul style="list-style-type: none"> • Description of your method for supporting the City's required contract terms and conditions. • Describe the software warranty for your software. • State the implementation services warranty for the quoted software. Identify all coverage points. Please specify when the warranty period begins and ends. • Specify all costs that we may be responsible for while the system is under warranty, e.g. labor, travel expenses, parts, etc
Section 7	Architecture	<p>Describe the system architecture, what software development tools are you using? List version numbers. What reporting tools are supported (SQL SRSS and or Crystal)? Are there standard published APIs for interfaces? If we wish to enhance the product, what knowledge and software development tools will we need in house?</p>
Section 8	Technical Requirements (Locally Installed & Hosted)	<p>Please present separate pricing on both options as we wish to evaluate both locally installed and hosted solutions.</p> <p>Include technical information regarding your proposed software:</p> <ul style="list-style-type: none"> • Desktop requirements. • Mobile options that you support: Apple iPad app, Android app, Surface, other tablets that have been tested. • Thin client solutions that are confirmed as supported: Citrix, VMWare View, etc. • Server side environment (database, hardware, server operating

		<p>system, network requirements, etc., Virtual technology supported?)</p> <ul style="list-style-type: none"> • Data conversion capabilities and requirements. • Recurring Service (recommended backups, routine database administration, performance tuning, other system maintenance, etc.) • Number of versions that we can install with the proposal (used as a redundancy in case of emergency). Identify any extra costs regarding this option if available. • Interfaces already built to other software. Included or not? • Proposed methodology for integration of the CAMA system with Laserfiche for document management, with ESRI GIS application, APEX for sketching, and Tyler MUNIS. • If in a hosted environment, how would we get our data back in case of disaster or switch vendors? Costs associated with retrieving the data?
Section 9	References	Please list at least five (5) references of other customers with installed systems of the software that you are proposing who are similar to our requirements. Specify the exact version of the software and all modules that the customer is using. Would prefer Wisconsin sites.
Section 10	Implementation Staff	Provide information as to staff expected to be assigned for software implementation by filling out Exhibit E.
Section 11	Implementation Methodology	Provide a brief overview of your implementation methodology and expected timeframe for this project including resources that we are required to provide in terms of tasks that will be assigned to us.
Section 12	Pricing	Provide a summary overview of the pricing model used to estimate costs including module pricing and implementation services.
Section 13	Audited Financial Statements & Annual Reports	Provide financial statement information as requested in Exhibit F. Finalists will be required to furnish the company's most recent annual report and the last two (2) years' annual financial statements for proof of financial solvency.
Section 14	Other Information and Attachments	Include in this section a copy of your proposed license, maintenance and implementation services agreements, along with any agreements relative to 3 rd party providers.
Section 15	Other Vendor Information	Use this section if you have any other material that you feel is important for our evaluation. Please limit the pages in this section.

I. Evaluation of Proposals

The City and/or its representatives will be the sole judge of the appropriateness and completeness of any and all proposals and reserves the right to reject any and all proposals that do not provide the information requested. Neither the City nor any agent thereof on behalf of the City of Beloit shall be obligated in any fashion by any response(s) to this RFP. The City reserves the right to negotiate those issues not included in the

proposal document. The City will not reimburse Firms for costs incurred in preparing proposals or traveling to any City of Beloit location to demonstrate products.

Proposals will be objectively evaluated by a qualified team of City of Beloit staff and/or stakeholder representatives. The most responsible proposal will be determined by criteria determined essential to the City as outlined below. The evaluation criteria are not limited to the lowest price.

The City may choose to conduct site visit(s) to the software vendor's headquarters and/or Firm's clients as part of the evaluation process. The site visits will be considered as part of the determination of the successful Firm. Evaluation of the client sites will be based on but not limited to the following:

1. Assessment of the Firm's performance during system implementation.
2. Assessment of the quality of the Firm's ongoing support.
3. Overall user satisfaction with the system and its reporting functionality.

Each proposal will be examined to ensure that it follows the proposal format and instruction in this RFP.

The City is seeking a Firm with the following qualifications:

1. A viable vendor in terms of financial position, customer base, and technology.
2. Has the ability to provide and implement an integrated CAMA software system that meets the City's requirements as described in this RFP.
3. Has the ability and flexibility to meet the City's regulatory and contractual requirements, and vendor expectations as summarized in this section and as detailed in the RFP.
4. Has experience in Wisconsin.
5. Has experience with municipalities the size of Beloit and the surrounding area.
6. Has the ability to support more than one municipality at a time.
7. Willing to enter into a contract which supports performance milestones and penalties when not met.
8. Has a proven history of successful on-time, on-budget, and in-scope implementations of the proposed software with the functionality required by the City for public sector entities similar to Beloit.
9. Provides a modern software application that will be easy to support for the foreseeable future with the flexibility to accommodate new technologies and future workflow changes within the department.
10. Provides a way for the City to protect its software investment and responsibly manage its ongoing support costs for at least 10 years.
11. Provides technical expertise and guidance in the implementation and configuration of the system (software, database, hardware, network and integration with 3rd party applications), and ongoing customer support following system implementation.

Proposal will be evaluated on some of all of the following criteria:

1. Ability to deliver integrated solutions that meet functional requirements with minimal

- modifications/customizations.
2. Firm's experience with similar customers and similar projects.
 3. Firm's qualifications (financial strength, company size, stability, product vision and direction, and ability to work with the City of Beloit.
 4. Firm's development and project management capacity, available support staff and response time expectations.
 5. Firm's recommended project plan, including installation, configuration, testing, and conversion timeframe.
 6. Whether the vendor agrees to a data conversion, then (assuming there are errors) repetitive data conversion runs until we have a clean conversion, clean testing of the software with the clean converted data, then a final data conversion just before Go-Live.
 7. Technology that meets the City's technology and IT requirements.
 8. Training plan.
 9. Feedback from customer references on vendor performance, reliability, service level and customer service and responsiveness.
 10. Demonstration of software and tools.
 11. Firm warranties for the software and implementation services.
 12. Adherence to requirements for RFP response including specified format.
 13. Conformance to required contract provisions.
 14. Total cost of ownership over 5 years (Software, annual maintenance and support, implementation services, training, hardware, database, resources required, etc.).
 15. Quality and completeness of the proposal.

All proposers will be notified in writing when a final selection of a Firm has been made and the contract has been executed. Contract negotiations may be conducted simultaneously with two or more Firms.

J. Contract

If your proposal is accepted and a contract is issued, the contract between the City and the selected vendor to provide the required software and related services will consist of:

1. This request for proposal.
2. The selected Firm's proposal.
3. The Firm's product demonstration and related handouts and electronic presentations.
4. Related commentary – any communications from the Firm clarifying the proposal, technology, project planning, implementation services, training, 3rd party applications, software functionality, support services and professional services.
5. Documents containing any additional items stipulated during contract negotiations.
6. A mutually agreed upon Statement of Work that outlines the project scope, project timeline, assigned responsibilities (Firm and City) and estimated hours by role for the major work components, deliverables, milestones, and costs by major work component.
7. A signature page.

Said contract between the City and the Firm shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto. Any agreement or contract resulting from the acceptance of a proposal shall be on forms either supplied or approved by the City. The City reserves the right to reject or modify any agreement which does not conform to the RFP and any City requirements for agreements and contracts.

The submission of a proposal shall be considered as a representation that the Firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal, and Local regulations that affect or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon execution of the contract by the proper City officials, and delivery of the fully-executed contract to the Firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful firm. The contract may be amended only by written agreement between the Firm and the City.

The documents constituting the contract between the City and the Firm are intended to be complementary so that what is required by any one of them shall be as binding as if called for by all of them. In the event of any conflicting provisions or requirements within the several parts of the Contract Documents, they shall take precedence in the following order:

1. Change Orders (with the most recent taking precedence).
2. Statement of Work.
3. Contract Document Amendments.
4. The Contract Document as Described in the Signed Agreement.
5. Request for Proposal Addenda.
6. Request for Proposal.
7. Firm's Proposal.

Other Contract requirements:

1. The License must allow and include for the license to use and the costs to setup a test and disaster recovery instance of the software (for software purchases).
2. We will agree on language that defines Final Acceptance that is the date after Go-Live in which all critical and significant issues are resolved.
3. The software maintenance is expected to have the first year included.
4. Software maintenance starts at Final Acceptance – not installation or the Go-Live dates.
5. For software – all data and information will be owned by the City.
6. For Cloud Solutions (if applicable):
 - a. The Contract will specify that we will be provided all of our data in a csv format at no cost within 5 business days of us requesting it when the contract is terminated plus at least once annually (so that the export is tested annually). If applicable, photos will be in jpg format, videos in mp4 format. Audio in an industry standard format.
 - b. The contract will specify that we will be notified of any information breach in the vendor's cloud within 48 hours, regardless if it is on our servers or on other customers.
 - c. The Contract will specify that the cloud solution will have a security audit annually and that

the report will be provided to the City within 1 month of receipt at no charge. The report will also include the vendor's plans and schedule to mitigate any issues identified. The vendor will keep us informed of the resolution of the identified risks at least every month until resolved.

d. Provide in your response the following:

- i. Your method of performing background checks on staff at hire and routinely, and your policy on what to do if any candidate or current employee has a felony or has a misdemeanor related to criminal theft or money, products, or information.
- ii. If any information of the City or its partners will be stored outside the US borders.
- iii. Explain what methods of remote access you use and how they are secured.
- iv. Explain how ID's and passwords for access to our servers and content are protected.

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal

Exhibit A

Software Vendor Executive Summary

This section contains the vendor information and response format that we would like you to present in "Section 2 - Executive Summary" of your proposal.

Vendor and Software Information	
1. Contact Information	
▪ Company Name	
▪ Name and Title of Contact Person	
▪ Address	
▪ Phone, Fax, Email	
▪ Company Website	
2. Regional Offices and Staff	
▪ Regional offices closest to our location	
3. Company Information	
▪ Year Founded	
▪ Private vs. Public	
▪ Fiscal year end	
▪ Revenue: Current Year	
▪ Revenue: Prior Year	
▪ Net Income/Loss: Current Year	
▪ Net income/Loss: Prior Year	
▪ What percentage of annual revenues goes toward research and development	
▪ Parent Company (If separate)	
▪ Genealogy of Organization (Changing missions, name changes, etc.)	
▪ Describe how the company has grown: "organically," thru acquisition, thru mergers, etc.?	
▪ Disclose any recent litigation (and outcomes) and litigation currently underway.	
4. # of Vendor Employees	
▪ Number dedicated to the proposed software	
▪ Number in our area (Wisconsin, Upper Midwest)	
5. Number of Customers On the Proposed Software	
▪ Total on proposed version	
▪ Total municipal customers (cities, counties, etc.)	
▪ List of Wisconsin customers on proposed version (The City may wish to visit at least one government organization using your system)	

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal

Exhibit A

Software Vendor Executive Summary

6. List some key customers similar to us (same size, same modules)	
7. Version Schedule	
▪ Current version and general availability release date	
▪ Proposed version & general availability release date	
▪ Estimated release date for next version	
▪ Typical release schedule & time to install	
▪ Number of prior versions supported	
8. Software Technology Overview	
▪ Platforms Supported & % of total for each	
▪ Databases Supported & % of total for each	

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
 Exhibit A
 Software Vendor Executive Summary

Form 2: Mobile Application Costs

Mobile Application Component	Package Name	Number of User Licenses	Total Cost	Annual Maintenance Cost
Mobile Application Subtotal:				

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit A
Software Vendor Executive Summary

Form 3: Interface Costs

Interface	Total Cost	Annual Maintenance Cost
Interface Subtotal:		

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
 Exhibit A
 Software Vendor Executive Summary

Form 4: Other Module/Component Costs

Module/Component	Package Name	Number of User Licenses	Total Cost	Annual Maintenance Cost
Other Module/Component Subtotal:				

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
 Exhibit A
 Software Vendor Executive Summary

Form 5: Total Application Software Cost

	Total One-Time Cost	Total Annual Maintenance Cost
System Software Cost (From Form 1)		
Mobile Application Costs (From Form 2)		
Interface Costs (From Form 3)		
Other Module/Component Costs (From Form 4)		
Total Application Software Cost		

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit B
Vendor Exceptions To The RFP

It is the City's intent to contract with a private vendor. All vendor representations, whether verbal or written, will be relied on by the City in its evaluation of the responses to this Request for Proposal. The City's reliance on the vendor's represented expertise is to be considered as incorporated into any, and all, formal agreements between the parties.

PRINT THE WORDS "NO EXCEPTIONS" HERE _____ IF THERE ARE NO EXCEPTIONS TAKEN TO ANY OF THE TERMS, CONDITIONS, OR SPECIFICATIONS OF THESE REQUEST FOR PROPOSAL DOCUMENTS.

IF THERE ARE EXCEPTIONS TAKEN TO ANY OF THESE TERMS, CONDITIONS, OR SPECIFICATIONS OF THESE REQUEST FOR PROPOSAL DOCUMENTS, THEY MUST BE CLEARLY STATED ON THE VENDOR EXCEPTIONS TO THE RFP TABLE BELOW AND RETURNED WITH YOUR PROPOSAL.

IF YOU PROVIDED A SAMPLE COPY OF YOUR CONTRACT YOU STILL NEED TO IDENTIFY IN THIS DOCUMENT ANY AND ALL EXCEPTIONS YOU HAVE TO THE TERMS AND CONDITIONS.

FIRM OR INDIVIDUAL _____

TELEPHONE _____

EMAIL _____

ADDRESS

PRINT NAME AND TITLE

AUTHORIZED SIGNATURE _____

DATE _____

OTHER NOTES:

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
 Exhibit B
 Vendor Exceptions To The RFP

Add any additional line items for exceptions as necessary and reference any explanatory attachments within the line item to which it refers.

RFP Section #, Page #	Exception <i>Describe the nature of the Exception</i>	Explanation of Why This is an Issue for You	Your Proposed Alternative to Meet City's Needs
1			
2			
3			
4			
5			

City of Beloit
Computer Assisted Mass Appraisal (CAMA)
Request for Proposal
Exhibit C

Functional Requirements Response
Instructions For Completing Functional Requirements

VENDOR RESPONSE

- 1) For each numbered line item requirement, the vendor must indicate in the "Vendor Response" column Y, N, C, F, or 3P according to the following legend:
 - Y** Fully supported by the current release of the software.
 - N** Not supported.
 - C** Customization is required to meet the requirement (e.g., changes to the underlying code must be made; a report must be specifically designed; causes additional upgrade work in order to implement new versions or upgrades, etc.).
 - F** Future functionality: Supported in the next release of the software.
 - 3P** Supported with third party software (i.e., software not directly owned or controlled by the vendor submitting the proposal).

- 2) If requested or if the vendor responds with 3P, C, or F, the vendor **must** provide additional information in the comments column:
 - **"C"** Vendor must explain the nature, cost, and amount of customization required, and experience with the same or similar modifications.
 - **"F"** Vendor must explain the functionality in the new release, the expected general availability release timing, and provide surety that the functionality will be included.
 - **"3P"** Vendor must explain what third party software application or service is required, any integration requirements, and the vendor's relationship with this third party.

The information must be completed and submitted in the format provided.

DEMONSTRATION AND PROOF OF CONCEPT

Vendors selected as finalists are expected to participate in a structured product demonstration and proof-of-concept session on-site.

PROJECT BACKGROUND

High-level requirements for CAMA Systems are on the following pages. Explain how your organization will deliver the following.

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
GENERAL PROJECT		
1 Ability to handle assessment function for more than one municipality. Each municipality must be treated as an independent entity including table rate creation.		
2 Ability to customize the definitions for viewing and managing assigned activities per individual user preference.		
3 Ability to configure data entry screens to look like paper forms/applications (to allow for efficient data-entry).		
4 Ability to customize data labels on screens.		
5 Ability to create notes for any data changes made.		
6 Ability to retain and index by ESRI GEO code, City Parcel ID number, PIN, situs address and owner's name.		
7 Ability to look up a record by parcel, address, owner alias, and point-driven location on a map.		
8 Ability to convert all existing data from current Assessment Software.		
9 Ability to use all existing area, style, influence, etc., codes or an automatic method to convert all data and supporting data to new codes.		
10 Ability to be year dependent for changing rules capturing all history of previous years.		
11 Workflow checks and balances to reconcile Tax Roll, Preliminary Values, Checked Values, Final Value flags.		
12 Ability to define neighborhoods geographically and/or by plat and property type.		
13 Ability to query by 1 st or 2 nd ownership line or mailing address lines.		
14 The ability to use Standard Windows commands such as Cut, Copy, Paste etc.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments
PROPERTY LISTING		
1 Ability to track division status through entire process.		
2 Ability to track comprehensive parcel history.		
3 Ability to maintain unique PIN's for each Real Estate and Personal Property account.		
4 Ability to create a new parcel and accounts, with the inclusion of the following information from the parent parcel which can then be edited as needed: District information (county, municipality, school, TIF, fire, etc.), parcel number, legal description, site address, mailing address, owner, recorded document number and type for the Register of Deeds, etc.		
5 Ability to automatically mark the parent parcel as "Pending" and the current parcel as 'Split' when new parcels are created. All parcels marked pending are used in the current year processes, and the split parcels are used in future year processes.		
6 Ability to duplicate common data across multiple parcels (e.g. owner name, billing address, plat name, assessed values, remarks, legal description, lot data).		
7 Ability to bring information forward from old parcels to new parcels with edit capabilities.		
8 Ability to maintain legal descriptions.		
9 Ability to prevent old parcel numbers from being reused, link old parcel with new parcel number preserving parcel history for tracking.		
10 Ability to display relationships between parcels geographically.		
11 Ability to link "old" parcel with "new" parcel when parcels are split or combined (Preserve parcel history for tracking).		
PROPERTY CHARACTERISTICS		

*if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
12 Ability to record the following fields for all parcels: School District, Class Codes, Property Use, Subdivision Code, Year Assessed, Parent Parcel, Historic District, Doorage, BID District, TID District, plus additional user defined fields.		
13 Ability to bring in property description information from outside source (i.e. MLS, CoStar).		
14 Ability to update multiple parcels at the same time.		
15 ADDRESSING (applies to Real Estate, Personal Property and Mobile Homes) Property addresses entered are validated against the master address database.		
16 Ability to record multiple addresses per parcel, including assignment of primary address.		
17 Ability to assign a range of house numbers to a single parcel.		
18 Ability to verify mailing address correctness per USPS standards (Nation-wide).		
19 Ability to change a mailing address on multiple parcels and/or accounts with the same ownership.		
20 Ability to accommodate military and foreign mailing addresses.		
21 Supports separate mailing addresses for various correspondence types, including effective dates.		
22 OWNERS (applies to Real Estate, Personal Property and Mobile Homes) Ability to record multiple Common Name/DBA name per parcel.		
23 Supports name aliases - formerly known as (FKA), doing business as (DBA), etc.		
24 Ability to share owner name and billing address between parcels.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
25 Ability to transfer parcels to identified and verified "same" owner.		
26 Ability to list multiple owners per parcel. Please indicate your maximum number of owners per parcel.		
27 Personal Property.		
28 Mobile Homes.		
29 Ability to create a mobile home with the following: Park Code, School District, TID.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
APPRAISAL		
1 Solution conforms to WI state legislation and DOR rules & regulations and USPAP.		
2 Ability to have multiple years with effective dates (new year records) with appraisal and value rolls to the next years.		
3 Ability to see and track historic assessment data with complete change history for multiple years.		
4 Ability to have table-driven codes defined for rates and factors, parcel appraisal codes, classification codes and allow relationships to be built between them.		
5 Ability to capture the following for Board of Review data: Date of first day, final day, location and time of meeting.		
6 Ability to capture appeal type and year on any parcel.		
7 Ability to capture the following for open book: date of first day, final day, location and times.		
8 Ability to identify Board of Review cases by year, by parcel, or account when filed.		
9 Ability to freeze values whether calculated or overridden.		
10 Ability to recalculate values on all parcels.		
RESIDENTIAL AND COMMERCIAL		
Ability to determine/calculate market value by:		
11 Sales/Market data.		
12 Income data.		
13 Cost data.		
14 Market Driven Cost.		
15 Ability to set property attributes/use on multiple records per parcel, including user-defined fields (i.e. Adding some data to multiple parcels).		
16 Ability to control what is printed on field or electronic property record cards.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
17 Set up Real and Personal Property classes to meet Wisconsin DOR requirements for mandated reports that are due to the State of WI Department of Revenue.		
18 Includes all classes of properties. (Residential; Commercial; Manufacturing; Agriculture; Undeveloped; Productive Forest; Agricultural Forest; Other; Department of Natural Resources Programs such as: Managed Forest Crop Open, Managed Forest Crop Closed, Private Forest Crop; Federal Exempt; State Exempt, County Exempt; Other Exempt) for all modules of Appraisal.		
19 Ability to apply the construction stage (partials) of completion, by percentage, on building segments or whole structure.		
20 Ability to calculate formulated/percentage of market value (i.e. Class 5&5m; land use restrictions and partially exempt parcels).		
21 Ability to calculate value/factors by neighborhood and property type.		
22 Ability to bypass re-assessment and do special selection for physical re-appraisals; customizable on an annual basis.		
23 Ability to flag parcels for appraiser follow-up by separate codes.		
24 Ability to schedule appointments for the appraisers and field technicians for interior inspections.		
25 Ability to link the parcel data with appointment schedule.		
26 Ability to maintain inspection history.		
27 Ability to have an inspection reminder for the assessor/appraiser.		
28 Validation in place to flag an inspection request.		
29 Ability to track and document properties with special situations and data need (e.g. mold, contamination, etc.).		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
30 The ability to have more than one change code per parcel (example: building removed, new construction and revalue).		
31 Ability to store I & E Filed, Valued By Field, Entrance Code, Viewed Date, Neighborhood Code.		
32 Ability to change prior years for assessment changes.		
33 LAND APPRAISAL Capability to value a single parcel with multiple land types and zoning types.		
34 Provides land tables for residential, commercial, manufacturing, multi family and agricultural land using units of comparison found in acceptable appraisal practice (i.e. square foot, front foot, depth factors, etc.).		
35 The land tables account for size adjustments, other factors that influence values, site value and multiple values per parcel.		
36 Provides additive adjustments, both positive and negative for location and other physical attributes.		
37 A summation of all adjustments based on influence factors stored in a user-defined table.		
38 Allows land use and zoning to be entered in the land valuation module.		
39 Ability to specify land soil classification, to breakdown to tillable vs. non-tillable and to associate farm programs and class of property.		
40 Ability to analyze and adjust land valuation characteristics individually.		
41 Ability to have user defined fields and selectable unit of measure:		
42 Water attributes.		
43 Lake frontage primary.		
44 Lake frontage secondary.		
45 Lake View.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
46 Lake Access.		
47 River frontage primary.		
48 River frontage secondary.		
49 River View.		
50 River Access.		
51 Square feet.		
52 Front/depth footage.		
53 Dimensions of irregular lots.		
54 Acreage.		
55 Gross (e.g. Condo land value).		
56 Land to building ratio.		
57 Adjustments for contaminations.		
58 Aggregate.		
59 Non-buildable/non-conforming lot.		
60 Easement acreage.		
61 Lack of off-street parking .		
BUILDING APPRAISAL		
Ability to store the following for residential improvements: Units, Stories, Style, Ext Wall, Year Built/Age, Year Remodeled, Effective Age, Basement, Finished Basement, Air, Fuel, Rooms, Bedrooms, Family, Full Bath, Half Bath, Additional Fixtures, Total Fixtures, Kitchen Quality, Kitchen Condition, Bath Quality, Bath Condition, Masonry Adjustment, Masonry Square Foot, Rec Room, Rec Room Quality, Unfinished Area, FP Stacks, FP Openings, Metal FP, Basement Garage, Add Features, Grade, C & D, CDU, Dep Table, Dep Percent, Basement Courses, Wall Construction, Whirlpool, Sauna, Hot Tub, Central Vacuum, Alarm Sys, Sprinkler, Exposed Basement, Override, plus additional user defined fields.		

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Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
63 Ability to store the following for commercial improvements: Group Code, Building Use, Perimeter, Stories, Quality, Roof Type, Ext Wall, Interior Finish, Rooms/Units, Baths/RR, Air, Heat, Frame, Elevator Adjustment, Story Height, Year Built, Remodel Year, Effective Age, Condition, Depreciation Table, Depreciation Percent, Observed Condition Code, Functional Obsolescence, Economic Obsolescence, Override, Appraiser, Appraisal Date, Sprinkler, Lateral Size, RR Spur plus additional user defined fields.		
64 Ability to store additional assessment information as needed.		
65 Ability to analyze building valuation characteristics individually and/or the ability to use separate approaches to value for each structure for parcels with multiple buildings.		
66 Ability to apply depreciation to selected features and other buildings.		
67 Ability to apply dimensions, effective age, and conditions to selected buildings on same parcel or secondary buildings on same parcel.		
VALUATION APPROACHES		
68 Multi Year Valuation – Capability to retain and provide accurate assessment data for all years that the City uses the CAMA system. Each assessment year retains data integrity to allow reproduction of historical information.		
69 Provides ongoing annual reassessment capabilities.		
70 Value Adjustments – Gives the user the option of adjusting values without manipulating data such as override values (This may be used for Board of Review decisions.)		
71 Capability of performing Multiple Regression Analysis and/or feedback.		
72 Ability to distribute value between multiple parcels, handling multiple approaches (One building on 2 or more parcels).		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
73 Ability to use the sales comparison approach (market approach), cost approach, and income approach for all improvement types including special purpose properties.		
74 Ability to prepare an income approach following the WPAM (Wisconsin Property Assessment Manual).		
75 Ability to create and update an income and expense database.		
76 Ability to select comparable rents from an income and expense database.		
77 Ability to create and maintain an overall rate database.		
COST APPROACH		
78 Ability to prepare a cost approach using Marshall & Swift Valuation service (Core Logic).		
79 Ability to prepare a cost approach using WI-DOR Manual.		
80 Includes data management of cost valuation components for residential, commercial, manufacturing, agricultural, productive forest, undeveloped, other, Department of Natural Resources Programs, and exempt properties.		
81 Ability to produce a printable and on-screen viewable cost valuation document showing the cost calculations on each property, the appraiser's adjustments and the final value determination.		
82 For residential properties, provides for reconciliation between the cost approach and the market driven (sales comparison) approach with economic factors as well as the standard depreciation for age, condition and functional and economic obsolescence.		
83 For commercial properties, provides for reconciliation between all approaches to value.		
84 Cost estimates are fully integrated with the market approach module to develop reports to study depreciation schedules, land rate schedules, neighborhood factors, date of sale adjustments and certain cost adjustment factors.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
85 The cost approach module computes value estimates based on standard appraisal methodology (acceptance by the International Association of Assessing Officers) with clear documentation for non-automated value computations and defense of values.		
86 The cost approach allows for adding land values and any site improvements.		
87 The ability to use a standard set of cost tables to determine the residential cost. Base rates per square foot are based on style, class, quality, number of stories, etc. The component costs are demonstrated in terms of cost and depreciation. Depreciation operates via effective age schedules and observed conditions.		
88 The ability to use a standard set of cost tables to determine the commercial cost. Base rates per square foot are based upon use/occupancy code, class, quality, and factor adjustments are made for number of stories, wall heights, perimeter to area-ratio, local multipliers, cost multipliers and multiplicative adjustments for entrepreneurial profit. Additive adjustments for heat/air conditioning, special features, etc. are applied. The component costs are easily understood in terms of cost and depreciation.		
89 Provides on-line updating of the data management file with the cost estimates. Includes the capability, in the years following the revaluation, of pricing any additions or new outbuildings through the cost approach, and adding the depreciated value of the new improvements to the market-generated amount.		
90 Cost schedule additions do not require program modifications. New codes are able to be added by updating cost schedules and data management tables.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
91 In addition to observed physical condition depreciation, ability to accommodate functional obsolescence (curable and incurable). Economic obsolescence and cost-to-cure either as a percentage calculation or as a lump sum subtraction.		
MARKET & SALES APPROACH		
92 The market value approach appraises individual properties and permits its use as a mass appraisal tool. Weights, percentages and dollar amount adjustments, and selection criteria are user definable.		
93 The ability to apply typical weights, percentages, and dollar amounts at the time of installation.		
94 The ability to assign weights to individual sales. For instance, there should be a default setting for weighting. The ability to assign a higher weight to the sale of the subject.		
95 Adaptable to time and location indices as well as neighborhood and subdivision adjustment tables. The depreciation tables are developed on a citywide basis using the market and observed condition influences.		
96 The commercial market approach includes the analysis and use of the standard units of comparison for various types of commercial properties. Please describe capabilities for this function, including adjustments for differences between the comparables and the subject.		
97 Ability to produce comparable sales reports for viewing on-line and via hard copy. The comparable sales reports include a photograph of the subject property and the comparables. Users have the ability to select the property characteristics that are used in selecting comparables.		
98 Ability to capture property data as of a sale date for real estate and mobile homes (Sales snapshot / history).		
99 Ability to prepare a sales comparison grid with ability to automatically or manually select sales from a sales database.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
100 Ability to adjust comparables on grid based on differences in property characteristics, including but not limited to adjustments by dollar value or percent of sale price.		
101 Ability to time adjust sale prices on the above grid.		
102 Ability to compare properties on the above grid based on various units of comparison (per square foot, per unit, etc.).		
103 Ability to weigh each sale based on comparability.		
ABILITY TO CALCULATE THE FOLLOWING TOTAL		
Simple Mean.		
Weighted Mean.		
INCOME REQUIREMENTS		
106 Income approach supports the individual and mass appraisal of commercial, industrial and multi-family properties as well as exempt properties.		
107 Provides for direct and indirect capitalization and residual techniques. Provides for capitalization rate extraction, maintenance of income and expense data (actual and market), units of comparison analysis, and gross income treatment of excess land in the income approach.		
108 Tables (number and percent) are available for various types of income (actual and market), vacancy (actual and market), expenses (actual and market) and overall cap rate by neighborhood and use. Table driven multipliers are used.		
109 Ability to store multiple years' income and expense data.		
110 Ability to adjust cap rate, vacancies, and expenses by building type, size, age (should be table driven).		
111 Ability to breakdown expenses by categories (e.g. reserves, tenant improvements, management fees, etc.).		
112 Ability to enter market and actual income data.		
113 Ability to assess properties by trend analysis based on stratified property characteristics or building type codes, and user-defined neighborhoods.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
114 Ability to capture rent info from Personal Property form without re-entry.		
STATISTICAL ANALYSIS		
115 Statistical analysis by all sales, assessment area (geographic location), property type, value range, tax key range, or any other selected property attribute or a combination of attributes. Ability to do sales ratio studies, including:		
116 Mean.		
117 Median.		
118 Aggregate ratio.		
119 Coefficient of Concentration.		
120 Coefficient of Dispersion.		
121 Price Related Differential.		
122 Standard Deviation by Classification.		
123 Coefficient of Variation.		
124 Ability to create "What if" sales analysis for new appraisal factors and rates.		
125 Ability to create sales files that maintain property characteristics at the time of sale.		
126 Ability to trend using user definable fields and characteristics; to trend land and building assessments individually or in mass as a valuation technique and/or to adjust reassessed properties.		
127 Ability to use previous year value or hypothetical previous year value in sales study.		
128 Transfer processing/screening. Ability to hold review codes in CAMA system (mirroring PAD system criteria established by DOR).		
EXEMPTS		
129 Ability to code parcels for exemption type.		
130 Ability to value exempt parcel for informational purposes.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
131 Ability to analyze exempt parcels by type, estimated value, and building characteristics.		
132 Ability to view exemption materials based on parcel number, PP account, etc.		
133 Ability to have user-defined exempt codes.		
134 Create and Track bi-annual exemption mailing and create bi-annual exemption report for WI-DOR.		
PERSONAL PROPERTY		
135 Ability to enter State Form Data Elements in the same order as the State of Wisconsin approved form PA-003.		
136 Ability to lock and unlock previous years data so no unauthorized data changes can be made. Data within personal property schedules will be carried to the next year and placed in the correct line. This function will facilitate pre-filing of forms for initial mailings.		
137 Ability to allow rounding of values to the nearest \$10 or \$100. Ability to set assessment parameters for assessed value.		
138 New Fields – all data fields from the current State of Wisconsin approved form, PA-003. The system shall also provide additional fields as follows:		
139 Date Form was Received/Filed.		
140 Extension Date.		
141 Date Valuation Completed.		
142 Appraiser Name.		
143 Business/Taxpayer FEIN (Federal Employer Identification number).		
144 Contact Person.		
145 Contact Phone Number.		
146 Contact Email Address.		
147 Manufacturing Assessed – (Yes/No).		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
148 SIC (Standard Industrial Code).		
149 1st Year Assessed Field – (year).		
150 Out of Business Field – (year).		
151 FKA (for name changes could be several).		
152 AKA (Also Known As).		
153 Years Doomed.		
154 Active vs. Inactive.		
155 Notes.		
156 Room for additional user defined fields.		
157 Ability to view all personal property accounts associated with a specific tax key number.		
158 The ability to track exempt and state assessed businesses.		
159 Ability to override any item, schedule, or final value on an account.		
160 Ability to automatically update each schedule's conversion factors as they are provided by the DOR annually.		
161 The ability to enter the equalized ratio annually as determined by the DOR.		
MOBILE HOMES		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
<p>Ability to store the following: Assessment Year, Tangible Exempt Codes, Manufacturer Name, Model Name, Arrival Date, Year of Manufacture, Year of Purchase, Purchase Price, Purchased New or Used, Purchased via Title of Bill-of-Sale, Mobile Home Width, Mobile Home Length, Home Square Foot, Additional Square Foot, Total Square Foot, # of Baths, # of Bedrooms, Total # of Rooms, Skirting, A/C, Fireplace, EFP, OFP/Deck, Patio, Carport, Shed, Dishwasher, Washer, Dryer, Serial Number, Where Purchased, License Number, Color, Number of Axels, Setup Fee, Except Furnishings / Setup, Misc. Cost, Additional Square Foot Costs, Mobile Home Cost, Total Cost, Grade, CDU, Fair Market Value, Net Fair Market Value, Equalized Ratio, Assessed Value, Net Tax Rate, Annual Fee, Monthly Fee, Lottery Claim Amount, Maximum Allowable Lottery Credit, Monthly Lottery Credit, Month of Coverage, Change Reason, Appraiser ID, Date of Inspection, Rental Status.</p>		
<p>163 Ability to store lottery credit calculation data: Equalized Ratio, Net Tax Rate, School Rate, Maximum Lottery Credit, Maximum Lottery Amount.</p>		
<p>164 Ability to store notes.</p>		
<p>165 Ability to integrate values from NADA Valuation Service or other 3rd party valuation source.</p>		
<p>166 Ability to assess mobile homes as real estate, personal property or via the monthly mobile home permit parking fee.</p>		
<p>167 Ability to calculate mobile home values and fees.</p>		
<p>168 Ability to link mobile home to Real Estate PIN of Site.</p>		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
REPORTS		
1 Solution includes all state and county required forms and electronic reports. Items include tax rolls, assessment rolls, assessment notices, personal/property form etc.		
INCLUDES THE FOLLOWING REFERENCE REPORTS (BY DATE RANGE)		
2 New parcels (Split, combined or annexed for the next assessment cycle).		
3 Deleted/Inactive Parcels.		
4 Pending Parcels (Parent parcels that will be deleted in the next assessment cycle).		
5 Shifts in Class.		
6 Assessment roll with the following filters: Municipality, TID, School District, Class, Improved, Unimproved, etc.		
7 Ability to print the assessment roll, with or without manufacturing values.		
8 Address cross-reference.		
9 Owner cross-reference.		
10 Ability to enter information necessary for submittal of a digital statement of assessment in a state prescribed format, including:		
11 Final board of review date.		
12 Omitted real estate values.		
13 Omitted personal property values.		
14 Palpable error.		
15 Reporting to allow assessment reporting changes by year .		
16 Download data into State of WI mandated reports.		
17 Ability to filter reports by TID, school district number and Sanitary District, aldermanic, historic, neighborhood, etc.		
18 Ability to send notices, income requests, sales requests and cost requests.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
19 Solution supports automatic file/report generation upon completion of certain tasks.		
20 Supports automated ad-hoc reporting and query system.		
21 Ability for the system to use template documents to send form letters etc.		
22 Ability to conduct in-house or outsourced printing of assessment notices (Individual notice as well as mass).		
23 Ability to conduct in-house or outsourced printing of property record cards (Individual and mass printing of all cards).		
24 Ability to conduct in-house or outsourced printing of customer surveys/QA letters.		
25 Ability to set an indicator to by-pass printing of assessment notices.		
26 Ability to do on-demand and batch printing.		
27 Ability to create long running reports in the background with a notification presented to the user on completion without locking the requestor's session.		
28 Ability to do queries and ad hoc reporting using CAMA system tables.		
29 Mailing Label Feature & Tracking – ability to select any variable of fields in the CAMA system to customize mailing labels or reports.		
30 Ability to mail merge and use any available editor for correspondence.		
31 Ability to print the State PA-003 Personal Property form with business/owner's name Mailing address, Account number, school district, TID and FEIN.		
32 Ability to run reports so users can find missing data or errors.		
33 Ability to print Mobile home notices, statements and invoices.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
34 Ability to print state mobile home forms (for example: LC-220, PA-118) using data from the system.		
35 Ability to print Acreage Reports.		
36 Ability to print Assessment Change Notices (PR-301).		
37 Able to print living unit counts by class and bedroom count.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
DATA INTEGRATION		
1 Provide acceptable documentation for file and field layouts.		
2 Ability to export data with user defined criteria and format. Need flexibility for standard and ad hoc requests.		
3 Ability to import multiple file formats. Please list accepted file formats.		
4 Ability to save exported data into multiple file formats.		
5 Includes Import / Export Utilities - such as SQL Server Integration tool or XML.		
6 Supports both batch and real time Integration.		
7 Supports specific integration tools, such as Web Services.		
8 Solution keeps data between separate modules in sync without need for manual triggers/intervention.		
STATE INTEGRATION		
9 Ability to push data to State, County, etc. electronically.		
10 Ability to track and summarize the change codes for special reports and the MAR Report for the State DOR.		
11 Ability to electronically export data to the Wisconsin PAD system for sales data at any time during the current assessment year using the PAD XML interface.		
12 Support automated workflow for property owner transfers, by interfacing to/from the recorded documents from State eRetr system: Grantor, Grantee, Legal Description, Document Number, Parcel Number, Document Type, Date of Record, Transfer fee.		
13 Accepts Manufacturing Values from the DOR and can import them into the system.		
14 Interfaces To / From State Dept. of Revenue - accepts files from DOR in format provided by DOR.		
COUNTY INTEGRATION		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *If vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
15 Interface to the Rock County Land Records Tax Module, and Zoning Module.		
16 Ability to link to online mapping service.		
17 Ability to selectively display information to web users based upon user ID or group.		
18 Supports web access to external entities.		
19 Ability for external user to access data using a "guest" account or as a registered user.		
20 Ability to reconcile assessment to taxation.		
21 Ability to spatially link and track permits from Rock county land records system.		
22 Ability to link and track permits from MUNIS for Real Estate and Mobile Homes.		
23 Ability to integrate with Core Logic (Marshall and Swift) valuations.		
SOFTWARE INTEGRATION		
24 Ability to have remote/wireless mobile data collection functionality.		
25 Ability to import appraisal data and values from other applications such as Apex.		
26 Ability to interface with Apex Sketch software for areas and sketches.		
27 Ability to interface to systems via web services, API calls or flat file data exports conforming to the standards provided by other application vendors.		
28 Ability to spatially link and track permits or other features to elements in the GIS, Interfaces to GIS.		
29 Supports address verification/standardization against a master table.		
LASERFICHE INTEGRATION		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
30 Method to directly Interface to Laserfiche for the selected parcel's Certified Survey Map at the county Register of Deeds, Deeds at the county Register of Deeds, Digital plans at the Inspections and Engineering Departments.		
31 Ability to interface to multiple photographs per parcel.		
32 Ability to Index by building number for commercial parcels.		
33 Ability to attach a description to each image.		
34 Ability to keep historical photographs and index by date.		
35 Ability to rank photographs for default pictures.		
36 Storage of Digital Plans, Appraisals, CSM, etc.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
GIS		
1 Ability to integrate and function with ArcGIS Pro 2.3 and ArcGIS Desktop 10.51 or higher. Systems include but are not limited to; enterprise geodatabase, ArcGIS for Server, ArcGIS Online, Map Services.		
2 Ability to interface with our current GIS application from a data sharing/accessing standpoint.		
3 Ability to have real-time update to GIS.		
4 Solution supports unlimited number of GIS layers.		
Ability to perform an ad hoc search and display of selected data in the GIS system using any or all of the following criteria but not limited to:		
5 Building/house number.		
6 Street Direction.		
7 Street Name.		
8 Street Type.		
9 Street Suffix.		
10 Last Name.		
11 First Name.		
12 Parcel Number.		
13 Personal Property Acct Number.		
14 Location Number.		
15 Ability to open a CAMA record by clicking on the parcel in the map in the GIS system and selecting which module to open.		
16 Ability to select a set of properties in the map in a GIS system and change CAMA attributes on all those properties.		
17 Ability to click on a show in map button or something similar and automatically zoom into the selected property in the GIS system.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
18 Ability to query any external data element in the solution through GIS (through a live link from PIN).		
19 Ability to display inspection requests in the map.		
20 Ability to display objections filed in the map.		
21 Ability to aggregate data for analysis.		
22 Ability to create graphs and charts via the GIS and CAMA data.		
23 Ability to have user-defined analysis criteria.		
24 Ability to validate street addresses and parcel information by interfacing with an ESRI GIS system.		
25 The ability to provide editing tools to automatically populate spatially related fields such as area, length.		
26 The ability to color code work activities by work type based on an address or property type.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *if vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
SOFTWARE / HARDWARE		
1 Has a normalized database design. Updates for any field that is used in more than one module (address) is only updated in one table and used by all modules.		
2 Customizations or enhancements are incorporated into future product releases.		
3 Ability to configure a user-defined "workspace" to organize and have access to frequently-used functions, workflows, reports, and other information (Dashboard).		
4 Software configuration as opposed to customization; Tailor the solution with configurable options, rather than source code modification.		
5 Implementation includes safeguards for an efficient, accurate and easily verifiable data conversion.		
6 Supports multiple environments - Test, Production, Training, etc.		
7 Ability to create and maintain an environment of both parcel data and multipliers for both testing and disaster recovery.		
8 Ability to do trial studies and recalculations with full or partial database within QA environment.		
9 Solution supports configurable automated processing (no need for manual calculations, updates, processing etc.).		
10 Supports batch processing.		
11 Solution used for end user reporting (e.g. MS Reporting Services (SSRS) or Crystal Reports).		
12 Virtual server support (preferred).		
SECURITY		
13 Ability to assign privacy level on user-created notes (viewable by user only, department only, all, etc.).		
14 Robust Security - User-based, Role-based, with configurable options to promote security adherence: expiring passwords, supports effective passwords, etc.		

Key Functional Criteria	Vendor Response Y, N, C, F, 3P	Comments *If vendor responds with C, F, or 3P additional information must be provided as noted on Instructions page.
15 Ability to keep private, public, and income (multiple) notes per parcel. (Income is confidential and secure in some cases, private is internal, public is public).		
16 Ability to have several security levels (e.g. administration, maintenance, corrections, and associate levels).		
17 Ability to restrict access at field level (e.g. SSN, income data, secure name).		
18 Ability to protect sensitive data, (e.g. SSN, personal property statement, transfer form, income/rent info).		
19 Ability to control exposure to non-finalized value data (related to year-end) based on date.		
20 Audits.		
21 Has audits for capturing record adds, deletes, updates, etc. by user, date and time (with reporting on these items).		
22 Ability for the system to support the use of effective dating, meaning the database tracks when changes were made and can reproduce the database records as of a given date.		
23 List your support for in field devices (notebooks, iPad, iPhone, and Android).		
24 Ability to archive data.		
25 Vendor provides exceptional technical support.		

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit D
Vendor References

Submit the minimum number of references (five) as required in the RFP. References provided must be for installations similar to that requested by the CCITC in the RFP.

1.

Name of Government or Company:			
Address:			
Contact Name and Title:		Name:	Title:
Contact Data:		Ph:	Fax: E-Mail:
Number of Parcels		Number of Personal Property Accounts:	
Estimated Number of Named Users:			
Interfacing Application if Applicable:			
Sketching Application:			
Costing Model:			
Project Description/Services Provided by Vendor:			
Start and Completion Dates:			

2.

Name of Government or Company:			
Address:			
Contact Name and Title:		Name:	Title:
Contact Data:		Ph:	Fax: E-Mail:
Number of Parcels		Number of Personal Property Accounts:	
Estimated Number of Named Users:			
Interfacing Application if Applicable:			
Sketching Application:			
Costing Model:			
Project Description/Services Provided by Vendor:			
Start and Completion Dates:			

3.

Name of Government or Company:			
Address:			
Contact Name and Title:		Name:	Title:
Contact Data:		Ph:	Fax: E-Mail:
Number of Parcels		Number of Personal Property Accounts:	
Estimated Number of Named Users:			
Interfacing Application if Applicable:			
Sketching Application:			
Costing Model:			
Project Description/Services Provided by Vendor:			
Start and Completion Dates:			

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit D
Vendor References

4.

Name of Government or Company:				
Address:				
Contact Name and Title:		Name:		Title:
Contact Data:		Ph:	Fax:	E-Mail:
Number of Parcels		Number of Personal Property Accounts:		
Estimated Number of Named Users:				
Interfacing Application if Applicable:				
Sketching Application:				
Costing Model:				
Project Description/Services Provided by Vendor:				
Start and Completion Dates:				

5.

Name of Government or Company:				
Address:				
Contact Name and Title:		Name:		Title:
Contact Data:		Ph:	Fax:	E-Mail:
Number of Parcels		Number of Personal Property Accounts:		
Estimated Number of Named Users:				
Interfacing Application if Applicable:				
Sketching Application:				
Costing Model:				
Project Description/Services Provided by Vendor:				
Start and Completion Dates:				

*****NOTE*****

IF THIRD PARTY PROVIDERS ARE ALSO PROPOSED, SUBMIT REQUIRED REFERENCE INFORMATION AS AN ATTACHMENT.

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit E
Software Vendor Implementation Staff Summary

For **each** staff member expected to be assigned to the engagement, please complete the following form with the requested information (include one form per person).

Vendor name	
Staff member name	
Position in the company	
Length of time in position	
Length of time at company	
Project position and responsibilities	
Education & Certifications	
Technical skills and qualifications for the project position	

City of Beloit Computer Assisted Mass Appraisal (CAMA) Request for Proposal
Exhibit F
Financial Qualifications

Complete a copy of this form for each firm supplying a major software component (e.g., if two firms are partnering to provide software, provide a copy of this form for each firm).

1. What was the Firm's annual gross revenue and net profit percentage during the last three fiscal years?

	Annual Gross Revenue	Net Profit
Fiscal Year 2018		
Fiscal Year 2017		
Fiscal Year 2016		

2. Provide the following for at least one bank reference.

Bank Name: _____

Address: _____

Phone: _____

Contact: _____