

REQUEST FOR QUOTE

FOR

**COMPUTER ASSISTED MASS
APPRAISAL AND ASSESSMENT
SOFTWARE**

FROM: ST JOHNS COUNTY PROPERTY APPRAISER
4030 LEWIS SPEEDWAY
SUITE 203
SAINT AUGUSTINE, FL 32084

APPROVAL DATE: MAY 18, 2018
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REQUEST FOR QUOTE: Computer Assisted Mass Appraisal and Assessment Software

This Request for Quote (RFQ) is being issued to obtain planning information. Your response shall be considered binding and shall be used as part of any contract negotiation if you are chosen as the winning vendor.

Please make every attempt to provide complete, accurate, and detailed information in your responses to this RFQ.

ISSUED BY:

St Johns County Property Appraiser
4030 Lewis Speedway, Ste 203
St Augustine, FL 32084

KEY DATES:

Release Date: June 11, 2018
Response Due Date: July 11, 2018

INQUIRIES:

Please direct all inquiries to:

cama_rfq@sjcpa.us

RESPONSES:

Responses should include a signed cover letter, and one copy must be electronically submitted via email to:

St Johns County Property Appraiser
cama_rfq@sjcpa.us

1. INTRODUCTION

1.1. PURPOSE

St Johns County Property Appraiser (or “SJCPA”) seeks to procure software and associated services to support appraisal business functions and to replace their existing software application, CustomCAMA. Proposers should include services to migrate existing data and integrate their solution with the indicated auxiliary systems.

1.2. ST JOHNS COUNTY PROPERTY APPRAISER OFFICE OVERVIEW

The St Johns County Property Appraiser is responsible for identifying, locating, and fairly valuing all property, both real and personal, within the county for tax purposes. The market value of real property is based on the current real estate market.

In addition, SJCPA performs the following functions:

- Track ownership changes
- Maintain maps of parcel boundaries
- Maintain descriptions of buildings and property characteristics
- Receive and process applications from individuals eligible for exemptions and other forms of property tax relief
- Analyze trends in sales prices, construction costs, and rents to best estimate the value of assessable property

SJCPA currently manages approximately 130,258 real property parcels and 10,947 tangible personal property (TPP) accounts.

1.2.1. User Counts

The following table represents approximate counts of staff within each business area who are anticipated to be users of the proposed solution. A core user is assumed to access the solution on a daily basis and require the ability to add and edit records. A casual user will access the solution occasionally and/or in a limited fashion; e.g. to address reporting needs or for use in a focused functional area.

Business Area	Count Core Users	Count of Casual Users
Management	4	0
Administration and Tax Roll	3	0
Residential Appraisal	17	0
Commercial Appraisal	4	1
Tangible Personal Property	2	3
Customer Service	8	2
GIS and Deeds	5	1
Information Technology	3	1

1.3. FUNCTIONAL SCOPE:

The following section lists the general solution capabilities sought by SJCPA. Section 1.3.1. provides a list of business areas/processes to be supported. Subsequent sections describe other areas of functionality SJCPA requires. These capabilities should be available to fully perform across all application functional areas of the solution; be configurable; and be operable by trained SJCPA employees with minimal effort by the solution contractor.

1.3.1. Major Business Areas Supported

The following list shows SJCPA department major business areas and specific processes in scope for the solution. Some of the areas listed include multiple processes and some areas support both real and personal property

- Residential appraisal-CAMA, market and cost approaches
- Commercial appraisal-CAMA, market and income approaches
- Personal property tax, business self-reporting, electronic submission and paper form
- Maintain real property characteristics—all types & variants
- Maintain ownership characteristics—all real and personal property
- Maintain market areas
- Maintain sales data, all real property
- Manage valuation appeals, real and personal
- Create/maintain property sketches
- Conduct field inspections/re-visits, real and personal property
- Valuation change process (taxpayer or Assessor initiated)
- Manage exemption processes
- Conduct real property parcel splits/combines
- Import & manage new construction permits
- Project tax revenues based on current and projected values and growth

1.3.2. Requirements Specific to Florida or SJCPA

SJCPA expects that the proposed solution will accommodate State of Florida requirements for property assessment and exemptions as described in Florida Statutes Title XIV and Title XV. Specifically, the solution should demonstrate support for state-mandated reports and the Florida Homestead Exemption.

i. Florida Homestead Exemption

The homestead exemption can provide up to \$50,000 off of the assessed value of a property used as the owner's primary residence. This includes an initial \$25,000 exemption with an additional exemption of up to \$25,000 off the assessed value over \$50,000.

Please review *Property Tax Exemption for Homestead* for an overview of the homestead exemption and explanations of other state and local exemptions available to property owners. (<http://floridarevenue.com/property/Documents/pt113.pdf>)

ii. State Reports

Assessment Roll. Florida DOR requires the Assessment Roll be submitted in the format described in Florida Statute 193.1142 (<http://flsenate.gov/Laws/Statutes/2013/193.1142>).

Truth In Millage Notice (TRIM). The "Truth in Millage" (TRIM) act is designed to inform taxpayers which governmental entity is responsible for the taxes levied and the amount of tax liability owed to each taxing entity. The Notice of Proposed Property Taxes is known as the TRIM Notice. The TRIM Notice establishes the statutory requirements that all taxing authorities levying a millage must follow, including all notices and budget hearing requirements. Further information is available on the Florida State DOR website (<http://dor.myflorida.com/dor/property/trim/abouttrim.html>).

State Reports and Forms. All Florida DOR reports should be included as a part of the proposed solutions. Forms are listed on the Florida State DOR website (<http://floridarevenue.com/property/Pages/Forms.aspx>).

1.3.3. Core Functionality

i. Work Management

The ability to assign work to a workgroup, specific individual, or to a queue in order to support high-use, repeatable activities. It includes the ability to schedule work, monitor progress, research status of a given work item, utilize work templates, and manage work

queues. Scheduling work for groups or individuals is needed by geographic area, work type, and as restricted by employee skill set.

ii. Sketch

An integrated drawing client (whether 3rd-party or proprietary) that provides the ability, in the office or field, to draw improvement boundaries, notate the sketch areas, and update the appropriate data fields in the CAMA software application with edits to the corresponding sketch information.

iii. Mobile Computing

The ability to utilize the elements of the solution in the field via a mobile computing device. Specifically, SJCPA seeks support for the following activities: create/update sketches; add/update property and ownership information; add/update personal property; capture notes regarding cases or other work being managed.

It is preferred that the mobile device can operate in an occasionally connected manner and that the data is checked out and checked back in to maintain version control. GIS Parcel data should be visible and usable on the mobile device.

iv. Configurable Workflow

The ability to configure workflows to support unique, high-use, repeatable activities. The workflow should aid in tasks such as: navigate the user through the proper screens; move the work-step to supervisory users for approval; and aid in the completion of queued work items.

v. Personal Property Inventory

Support, in a secure portal, the submission of personal property inventory and related ownership and location information. The portal submission process would allow Personal Property taxpayers to submit, modify, and confirm their annual personal property inventory for all properties owned.

1.4. SERVICES REQUIRED

1.4.1. Software Implementation

SJCPA is requesting full support in its implementation of the chosen solution. The following activities, as applicable to your proposed solution, should be included.

- Table and system set-up and configuration options.

- Fit-gap and best practices use of your solution.
- Security design and set-up.
- Configuration of interfaces with other applications.

It is critical to SJCPA that the transition from the legacy system is transparent to our taxpayer base and minimizes, to the extent possible, the impact to our daily business processes. We would like Proposers to offer the implementation approach that best considers SJCPA's priorities.

1.4.2. Project Management

SJCPA expects the selected Proposer to name a highly-qualified project manager for the project (as well as subject matter experts, technical developers, and upgrade specialists, among others), who will provide onsite project management to work alongside SJCPA on agreed time frames to produce and maintain the overall project implementation plan and schedule. SJCPA will also provide a project team to coordinate internal resources, facilitate communication at all levels, facilitate decision-making and provide oversight and auditing.

Other elements related to project management include:

- Status reports
- Meeting facilitation, issue resolution, etc.
- Documentation of changes, required actions, decisions, etc.
- Management briefings
- Identification, mitigation planning, and research for any identified risks
- Support and participation in project communication activities
- Deployment and post go-live, on-site support

SJCPA will value a comprehensive project management approach that incorporates elements of planning and alignment, governance, risk management, quality assurance, and implementation plan development.

1.4.3. Data Migration

SJCPA intends to convert all active data and any additional data required to support full use of the proposed solution. We expect the selected vendor will lead a successful data migration effort including detailed planning, data clean-up, data mapping, development of conversion specifications, conversion testing, production conversion, go-live activities and post go-live clean-up activities.

SJCPA will be responsible for providing the vendor with reasonably clean source data and knowledge of the legacy system and data structure. SJCPA expects to play an active role in the conversion and migration of data.

1.4.4. Interface Development

The following interfaces are expected to be functioning at “go-live” and require support by your personnel as part of the solution implementation. Further definition of these interfaces will occur prior to any contract with the winning vendor.

GIS: Interface with ESRI ArcGIS 10.6 (SQL Server 2016) to provide view of geospatial data, as contained in the Assessor’s enterprise ESRI GIS using the parcel or improvement context provided by the CAMA software application. The solution should also provide basic geospatial viewing functionality such as pan, zoom, and use of identify feature.

Docuphase: Interface with DocuPhase 6.0 (SQL Server 2012) document management system for storage and retrieval of files. This is distinct from any inherent file attachment functionality provided by your solution.

Imagery (Pictometry, Aerial, Oblique): Utilize SJCPA imagery (currently Pictometry) in the solution such that user has full use of oblique images.

Desktop Appraisal: Interface with iLookabout GeoViewPort or provide native desktop appraisal within the CAMA system. The interface should be bidirectional allowing a user to pull up a parcel within the Desktop Appraisal system and have the CAMA system navigate to the parcel as well and vice versa.

1.4.5. Configuration

Support and knowledge transfer (may be called technical training) is desired to correctly set table values, configure system settings, and other configuration values as needed to ensure that they solution performs as desired within its functional limitations.

1.4.6. Training

SJCPA expects the successful proposer will provide various levels of training related to the proposed solution including but not limited to the following: technical training, project team training, and end-user training. We anticipate that training will include a thorough transfer of knowledge of system configuration and set-up.

Technical Training. We expect the proposer to deliver training to a core team of SJCPA technical staff. Training should address, at a minimum system technical architecture;

database architecture, schema, and administration; system configuration and administration; ad-hoc reporting; and security configuration and administration.

Project Team Training. We expect the proposer to deliver training on the use of the proposed software to a project team of SJCPA staff. The intent is to provide sufficient familiarity with the solution to facilitate development of business policies and procedures and to make software configuration decisions.

End User Training. We expect the Proposer to deliver train-the-trainer instruction to a team of SJCPA trainers. The Proposer will plan and develop appropriate end-user training including training curriculum and required materials. In turn, SJCPA instructors will deliver end-user training to end-users with support from the Proposer. All end-user training will be conducted at a facility or facilities located in St Augustine, FL.

1.4.7. Hardware Recommendation

No hardware is being sought as part of this RFQ. Any server upgrades or purchases will be performed under an additional procurement. However, SJCPA requests that proposing vendors specify recommended hardware requirements (complete with all operating system recommendations).

2. REQUESTED INFORMATION

For each of the topics listed below, please provide concise, accurate, yet complete answers. We are not providing a page limit—either in total or for a given question—however, please do not include lengthy responses or procedural information, e.g., such as information that might be found in a method document or a full-featured brochure.

Please make every attempt to provide your information in the context of the requests below.

1. **Company.** Provide an overview of your company by completing the table shown below. Sample data is provided for clarity.

COMPANY NAME	PARENT COMPANY	HEADQUARTERS ADDRESS	POINT OF CONTACT
Acme CAMA	Consolidated Acme	123 Main Street Anywhere, State	Jane Doe 123.456.7890 Jane@acme.com

2. **Statement of Work.** Provide a summary statement-of-work (SOW) that describes your project approach to implementing your solution at SJCPA. Include phases, rough timelines (use months as your calendar increment), major milestones, a summary description of each phase or task, and the title of each deliverable. Clearly state all assumptions. *Include both a sample statement of work and project plan from a recent project (within past two years, preferably in Florida).* Include all of the following support areas:
 - a. Gap/Configuration
 - b. Data Migration
 - c. Train-the-trainer
 - d. Interface development & deployment
3. **Solution.** List all of your Assessment software products and associated modules. Include a very brief description. If your company sells more than one product line in this space, please list all products.
4. **Data Migration:** Describe your approach to successful data conversion and provide a data migration plan, authored by your company, from a recent project. Indicate major activities, project timing, and roles for both vendor and SJCPA. Where does your experience show that problems are likely to occur? How do you address validation of migrated data?

5. **License.** Describe your method of providing SJCPA with the licenses, maintenance fees, and all other initial and ongoing costs and obligations. In the price proposal provide the price for each of the items described.
6. **GIS Integration.** Explain the extent to which your product is integrated with ESRI GIS. Describe the *current* capability of the proposed solution to address the activities described in items *a - d* below. Provide a three-year development roadmap of GIS integration for your product.
 - a. The ability to trigger GIS views of identified individual property accounts
 - b. The ability to access individual property accounts from GIS selections
 - c. The ability to access multiple property accounts from GIS selections (e.g. drawn polygons).
 - d. The ability to make mass changes to accounts based on GIS selections or criteria
7. **Future Support.** Describe your approach and response standards for accommodating legislative changes. Under what circumstances, if any, would SJCPA incur costs beyond annual maintenance? How is our responsibility determined?
8. **Technology.** In the price proposal provided, describe the technology used to support your solution. Include database platforms supported; coding languages used to develop your product; operating systems supported; and mobile platforms supported (hardware, OS, database, and connectivity requirements).
9. **Price Proposal.** In the price proposal provided in **Exhibit A**, show all costs required to successfully implement your solution. Include ongoing costs. Refer to the user counts in Section 1.2.1 above for use in your calculations. Note that we consider a “core” user as an individual who will use the functionality on a regular (daily) basis. Casual users will interact with the solution only occasionally.
10. **Requirements Matrix.** Proposal should include the reports as listed in **Exhibit C – Requirements Matrix**. Complete and return with submittal response.
11. **Imports and Extracts.** The report requirements are listed in **Exhibit B - Imports and Extracts**. Proposal should include the reports as listed in **Exhibit B**.
12. **Reports.** The report requirements are listed in **Exhibit D – Reports**. Proposal should include the reports as listed in **Exhibit D**.

13. **References.** Provide three (3) Florida Property Appraiser client references utilizing Respondent's **proposed** software/solution **in production**, with descriptions and supporting information. Also, please provide a list of all property appraiser/tax assessor clients with length of service. Please identify the size and magnitude of the property appraiser/tax assessor clients' jurisdictions. If three Florida references are not available an out of state reference can be used provided they are using the proposed software.

Exhibit A - Price Proposal

	Price	Subtotals
Software Total		
License Fee (site license)		
Third Party Software (list individually)		
Services Total		
Project Management		
Installation		
Gap/Fit Analysis		
Migration and Conversion		
Conversion		
Integration		
Customization		
Training Total (list training sessions)		
Support and Maintenance Total		
Annual Support		
Third Party Support		
Customization		
Additional Fees (Itemized)		
Optional Software		

**Please include any and all financing alternatives (i.e. Lease Purchase Agreements or Options)

Exhibit B – Imports and Extracts

1. Tax Roll export for Tax Collector
2. Tax Roll export for Taxing Authorities
3. Homestead Renewal Mailing Extract
4. Address change extract for Tax Collector
5. Import of VAB Petitions from AXIA
6. VAB Extract for AXIA
7. Extract for TRIM Mailing
8. Import MLS data to be used in Sales Ratio Analysis
9. Permit Import
10. Import for Online Homestead application data
11. Import Online TPP application data
12. Extract for GeoViewPort
13. Import for GeoViewPort
14. Import via barcode for returned mail
15. Public data export
16. Extract for Roll Submission (NAL, SDF, NAP, and public NAL with no ssn)
17. Extract for NCOA mailing verification
18. Extract for TPP Return mailing
19. User audit report extract (automated weekly and manual upon request)
20. Business Tax Receipt import for Tangible Personal Property data
21. New subdivision import for Real Property