

**City of Racine
Request for Proposals (RFP)
Computer Assisted Mass Appraisal Software**



City of Racine, Wisconsin

Schedule of Events & Information	
November 19, 2019	Published in Newspaper Posted to Website Emailed
November 22, 2019	Published in Newspaper
December 17, 2019 by 1:00pm	DUE DATE Bid proposals received after this time will not be considered.
December 2019	Review
TBD	Finance & Personnel
TBD	Common Council
2020	Award & Issue Purchase Order or Contract
Method of submittal	Mail In-person
Submit Proposals to	Monica G. Santos - Purchasing Agent City of Racine Finance – Purchasing Department 730 Washington Ave. Room 105 Racine, WI 53403 Office: 262.636.9143 Fax: 262.636.9100 Email: monica.santos@cityofracine.org Website: http://www.cityofracine.org/purchasing

The undersigned hereby proposes to furnish all labor, tools, equipment and all materials, except as definitively specified to be furnished by others, ready for use, all in accordance with these specifications, all as attached hereto and all of which the undersigned has examined, the following work for the compensation indicated.

Firm: _____

Name: _____

Title: _____

Address: _____

Phone: _____

Email: _____

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Section I: General Information

A. Introduction

The City of Racine, WI (the “City”) is seeking proposals from software companies to provide a computer assisted mass appraisal software.

B. Description of City

The City of Racine is located 22 miles south of Milwaukee on the western shore of Lake Michigan, and is bordered on the south by the Villages of Mt. Pleasant and Elmwood Park, on the west by the Villages of Mt. Pleasant and Sturtevant, and on the north by the Villages of Wind Point and Caledonia. Racine encompasses approximately 15.5 square miles of land and has a population of 78,860.

Racine currently employs over 1000 full and part -time staff members. The City operates under a Council/Mayor form of government and follows a calendar fiscal year.

C. Racine’s Assessment Process

The Assessor’s Office currently utilizes AssessPro (AP5) through Patriot Properties for their assessment software.

The assessor workflow calendar includes cyclical process that starts January 1st with several critical deadlines throughout the year. The CAMA software will be required to produce and manage data as well as support the assessment staff in several key areas:

1. Discover, list and value all real estate parcels by class, type, and use Computer Assisted Mass Appraisal techniques and systems, including appraisal/appeal templates with sales grid, as well as, an income approach analysis table to produce the annual city wide reassessment
2. Capability to be functional in the field via a tablet, laptop or smartphone
3. Gather building permit data from the City computer system to be integrated in to district reports
4. Extract deeds and transfer returns from the County system and State Department of Revenue Electronic transfer return
5. Update and maintain ownership records including deed plotting(Engineering site design), legal descriptions and property joins and splits
6. Extract State Assessment Rolls and review change and apply to our system database. Create the assessment roll in electronic and printed format
7. Extract properties by parcel for field audit from the department of revenue Assessment management system, Create district activity and tracking reports for use by assessor in the field review process, Electronically submit the fielded sales data to the department of revenue
8. Create, revise and update sketches, floor plans, site drawings buildings placements using sketching/drawing software capable of direct integration into the CAMA, GIS and State Databases. Sketches should have the ability to calculate square footage.
9. Create and populate personal property forms electronically and produce labels and reports for personal property mass mailing. Directly interface with Department of Revenue to upload personal property report summaries
10. Create assessment reports including:
 - a. Assessment Rolls in several formats(Summary and Exhaustive)

- b. Sales reports sufficient for ratio studies, sales analysis and statistical review
 - c. Ownership, property type, activity, checking, audit, land use, building characteristic, neighborhood, aldermanic, tax incremental financing, business improvement district reports
 - d. Board of Review activity reports
11. Create and electronically submit State Department of Revenue reports:
 - a. Municipal Assessors Report
 - b. TID Assessment Report
 - c. Annual Assessment report
 - d. Annual Statement of Assessment
 12. Create custom datasets and reports as needed by assessors
 13. Provide public access to electronically held assessment data
 14. Produce property records cards for individual or mass delivery to stakeholders
 15. Utilize workflow and maintain clear audit trails
 16. Have the capability to adjust screen view and font size of printed reports

D. Public Records

The documents submitted in response to this request for proposal become public record upon submission to the City subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of the Wisconsin Freedom of Information Act. If the City receives a request for inspection or copying of any such document it will promptly notify the person submitting the documents to the City by U.S. mail. The City assumes no contractual obligation to enforce any exemption on behalf of a respondent to this RFP.

E. RFP Coordinator

Upon release of this RFP all communications concerning this proposal request should be directed to the contact info listed below. Unauthorized contact of City staff regarding this RFP may result in disqualification. Any oral communications will be considered unofficial and non-binding to the City. The respondent should rely only on written statements issued by the RFP Coordinator.

Monica Santos - Purchasing Agent City of Racine	
Telephone:	(262) 636-9143
Email:	monica.santos@cityofracine.org

F. Questions Regarding the RFP

Requests for clarification or additional information must be made in writing to the RFP Coordinator, as defined in Section 1-E prior to the date specified in the RFP Schedule Section 1-F. The RFP Coordinator will be unable to respond to requests for additional information or clarification received after the date listed in Section 1-F.

G. RFP Amendments

In the event of a material modification, all known and/or potential proposers will be notified of an amendment to the RFP. If deemed necessary by the City, proposers will be given an opportunity to modify their proposal in the specific areas that are affected by the modification.

H. Proposal Submission

Each proposer must submit five (5) copies of their proposal to the City RFP Coordinator. Additionally, one electronic copy of the proposal and any supporting documentation (PDF) must be submitted on a flash drive to the City. The complete proposal package must be submitted in a sealed envelope, clearly identified as "RFP - CAMA".

The City's proposals will be mailed or delivered to:

City of Racine
Monica Santos
730 Washington Ave., Rm 105
Racine, WI 53403

Proposals shall be submitted no later than the date listed in Section 1-F. Any proposal submitted after this time will not be accepted and will not be considered. Proposers accept all risk of late delivery of mailed proposals regardless of fault. Facsimile and other electronically transmitted proposals will not be considered. All proposals and accompanying documentation become the property of the City and will not be returned.

I. Terms and Conditions

The City reserves the right to amend the RFP schedule or issue amendments to the RFP at any time. The City also reserves the right to cancel or reissue the RFP, to reject any or all proposals, to waive any irregularities or informalities in the selection process, and to accept or reject any item or combination of items. The City reserves the right to request clarification of information from any proposer or to request supplemental material deemed necessary to assist in the evaluation of the proposal. The City reserves the right to effect any agreement deemed by the City to be in its best interest. This RFP does not obligate the City to accept or contract for any expressed or implied services.

In the event that the proposer to whom any services are awarded does not execute a contract within thirty (30) calendar days after City Council approval, the City may give notice to such proposer of intent to award the contract to the next most qualified proposer or to call for new proposals and may proceed to act accordingly.

The City will not reimburse any proposer for any of the costs involved in the preparation and submission of responses to this RFP or in the preparation for and attendance at subsequent interviews.

Proposers shall thoroughly examine and be familiar with these specifications. The failure or omission of any proposer to receive or examine this document shall in no way relieve any proposer of obligations with respect to this proposal or the subsequent contract.

The executed contract may be terminated by the City in the event the successful bidder:

- Fails to meet delivery schedules;
- Defaults in the payment of any fees;
- Otherwise fails to perform in accordance with this contract;
- Becomes insolvent and/or files for protection under the bankruptcy laws.

The vendor shall be entitled to just and equitable compensation for any satisfactory work completed through the termination date. Under no circumstances will any damages be paid as a result of the termination of this contract. If the City exercises the right to terminate the contract early, the vendor may be prohibited from submitting future proposals to the City for a specified period.

Section II: Proposal Evaluation

Proposals will be evaluated by a committee of City staff. Evaluations will be based upon the criteria outlined herein which may be weighted by the City in a manner it deems appropriate. All proposals will be evaluated using the same criteria and weighting. The criteria used will be:

A. Responsiveness to RFP

The City will consider all the material submitted to determine whether the proposer's offering is in compliance with the RFP. It is important that the responses be clear and complete so that the evaluation committee can adequately understand all aspects of the proposal.

B. Ability to Perform Required Services

The City will consider all the material submitted by each proposer and other relevant material it may otherwise obtain to determine whether the proposer is capable of, and has a history of, successfully completing contracts of this type. The proposer shall furnish acceptable evidence of their ability to perform regarding such categories as expertise and experience.

C. References

The City may contact references directly to inquire about the quality and type of services that have been or are currently being provided to other customers.

D. Fees

The City's evaluation process is not designed to simply award the contract to the lowest cost proposer. Rather, it is intended to help the City select the Vendor with the best combination of attributes including price.

E. Presentation and Interviews

Software presentations and Interviews will be conducted to help the City make a final selection. Selection shall be based upon the evaluation criteria, committee's recommendations and will be subject to City Council approval. It is the City's intention to select one vendor.

Section III: RFP Response

Proposal Format

Proposals should be prepared simply and economically, providing a straight-forward, concise description of product capabilities to satisfy the requirements of this request. Special bindings, colored displays, promotional materials, etc., are not desired. Emphasis should be placed on completeness and clarity of content. All proposal responses must be in the following format:

1. Cover Letter / Executive Summary
2. Table of Contents
3. Company Profile and Qualifications
4. References
5. RFP Functional Requirements Response

6. Technical Requirements Response
7. Cost Proposal
8. Attachments

The desired information in each of these sections is described below.

1. Cover Letter / Executive Summary

The cover letter should contain the name of the proposing Company, the business address of the proposing officer(s), and the contact individual to whom questions shall be submitted. Contact information should include telephone number, fax number, mailing address, and email address. The cover letter must be signed by a person or persons authorized to bind the proposer.

The proposer shall include a brief summary that includes the factual aspects of the response, experience and qualifications of the proposer, staff, consultants, and sub-consultants and/or suppliers.

2. Table of Contents

The contents of the proposal shall be included in an index at the beginning of the proposal and should include all contents and attachments.

3. Company Profile and Qualifications

Please respond to the following company profile questions; be as concise as possible.

1. Provide the full name and principal address of the company, as well as the distance of your nearest office to Racine City Hall and the location that will support the City. Include the state in which the Company is incorporated and the date of incorporation. Give a brief overview of the general background and services provided by your firm, including size of organization, description of organization structure, number of years in business and experience in implementing CAMA solutions for governmental entities.
2. Provide the address of the location that will support the City for the program implementation. List the staff at that location committed to the product and the phone support and on-site support available. Provide staff resumes with job descriptions and other detailed qualification information for staff likely to be involved in the implementation of the product at the City.
3. Indicate if any affiliates, including subcontractors or sub-consultants, will be used to fulfill the contract requirements.
4. List municipal government clients of the vendor in Wisconsin who are using your product.
5. Discuss the Vendor first-tier customer support and how second-tier support is provided. Include the hours first tier support will be available, after hours support available and documented response time for critical issues and non-operational impacting issues. Include a description of Tier 2 support and the documented response times back to the Vendor for a client issue that has been promoted to the Second Tier support entity resolving the issue.
6. Discuss initial training and ongoing training schedule.
7. Provide a sample record card produced from the system.

8. If your company is selected as one of the final vendors, please be prepared to show your financial strength by providing a copy of your company's financial statements for the past two years.

4. References

Provide a minimum of three (3) client references of similar sized and/or municipal accounts which the proposer has served over the past two years and/or is currently serving. Provide a contact person, telephone number, and email address for each reference customer. References in Wisconsin would be most relevant.

Also include a list of all Vendor's municipal projects in the last five (5) years and the timeliness in which they were completed and any other relevant information.

5. Functional Requirements

The Vendor shall be responsible to furnish, install, implement, integrate, data transfer, train, and maintain a software system that will meet the requirements defined in this RFP and in the Functional and Technical Requirements. In addition, the City would like the initial modeling tables to be completed by the vendor.

Please submit a detailed description of the software and integrations. This description should include the ability to search, filter, and access property data by key attributes (tax key, address, coordinate, vector, ect). It should describe sketching, calculations, and field use capability. It must describe security, permissions (user defined access levels), the use of workflows, and audit measures. It should describe the ability to integrate with our other City systems such as Munis, GCS, Cityworks, and GIS and the ability to seamlessly integrate with the Department of Revenue, as described in the attached excel sheet. It should discuss the capability of a public web interface as well as an internal web interface.

Please address the following criteria as outlined in Attachment A (separate, provided Excel sheet).

Please provide other solutions that Racine may be interested in adding in addition to this product and descriptions of these solutions with cost estimates.

Please provide the details of a project plan, including a schedule/timeline from contract execution through implementation and training to actual launch.

6. Technical Requirements

- a. Please indicate compliance with the City's technical infrastructure components:
- b. Server operating systems: Windows Server 2016 or Above
- c. Desktop operating systems: Windows 10 or Above
- d. Server platform: Physical or Hyper-V
- e. Preferred database: Microsoft SQL Server 2016 or Higher
- f. Microsoft Office 2016 or Higher
- g. Exchange 2010 with potential for O365

Please state any potential issue with the above software components.

Please provide a complete description of the environment necessary to support and run the proposed CAMA solution. Include minimum and recommended server(s) and client configurations. Include the minimum and recommended database configuration, as well as an estimate on storage

needs for the initial five years. Indicate whether the solution is compatible and will run in a virtual environment using Hyper-V.

7. Cost Proposal

Please provide an all-inclusive, not to exceed cost proposal for the engagement based on the configuration information contained below. Keep pricing detailed when completing a pricing quote worksheet. List quantity as appropriate.

- Software will need to support **10 full function** users and an additional **view/read** only users
- Specify primary software cost (Break out modules if applicable)
- Specify if software is a site or per seat licensing model, if per seat show licensing cost/seat
- Cost for any recommended integrations
- Cost for server(s) software
- Cost for Database software
- Cost for client access licenses (CAL's) to access the database if a CPU license is not quoted
- Include first year maintenance cost
- Project maintenance cost for years two through five

Professional Services - Specify your standard rates for professional service inclusive of travel expenses in the event additional services are needed.

	Professional Services	Hourly Rate Off-site	Hourly Rate On-site
1.	Project management		
2.	Senior implementation support		
3.	Junior implementation support		
4.	After-hours phone support		
5.	Technical troubleshooting specialist (DBA, network, etc.)		

8. Attachments

Additional information that the proposer believes is critical to the City's assessment of the Vendor's proposal should be included in this section. As noted previously, marketing and promotional materials are not desired for review of the response to the RFP.

****Attachment A has been provided as a separate attachment in excel format ... RFP CAMA**

****Attachment B has been provided as a separate attachment ... RFP CAMA Conversion**

9. Information and Questions

**SEALED PROPOSALS MUST BE RECEIVED NO LATER THAN:
December 17, 2019 by 1:00 PM, CST**

Complete BID or Proposals packages may be downloaded at the website listed on page 1. Vendors are responsible for checking this website for addenda prior to submitting a statement of qualification.

The City of Racine is not responsible for the content of any package received through any 3rd party service. It is the sole responsibility of the vendor to ensure the completeness of the documents received from any 3rd party.

Have you performed any work for the City of Racine in the past?	YES	NO
Are you part of the Disadvantage Business Enterprise (DBE) Program?	YES	NO
If you answered no, would you like more information?	YES	NO
Are you fully certified with the State of Wisconsin?	YES	NO

10. Indemnification and Insurance Requirements:

Indemnification

To the fullest extent allowable by law, Contractor hereby indemnifies and shall defend and hold harmless the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers and each of them from and against any and all suits, actions, legal or administrative proceedings, claims, demands, damages, liabilities, interest, attorneys' fees, costs, and expenses of whatsoever kind or nature whether arising before, during, or after completion of the work hereunder and in any manner directly or indirectly caused, occasioned, or contributed to in whole or in part or claimed to be caused, occasioned, or contributed to in whole or in part, by reason of any act, omission, fault, or negligence, whether active or passive, of Contractor or of anyone acting under its direction or control or on its behalf in connection with or incident to the performance of this Agreement regardless if liability without fault is sought to be imposed on the City of Racine, Contractor's aforesaid indemnity and hold harmless agreement shall not be applicable to any liability caused by the sole fault, sole negligence, or willful misconduct of the City of Racine, or its elected and appointed officials, officers, employees or authorized representatives or volunteers. This indemnity provision shall survive the termination or expiration of this Agreement.

In any and all claims against the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers by an employee of Contractor, any subcontractor, or anyone for whose acts any of them may be liable, the indemnification obligation under this paragraph shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the Contractor or any subcontractor under Worker's Compensation Acts, Disability Benefit Acts, or other employee benefit acts.

No provision of this Indemnification clause shall give rise to any duties not otherwise provided for by this Agreement or by operation of law. No provision of this Indemnity clause shall be construed to negate, abridge, or otherwise reduce any other right or obligation of indemnity that would otherwise exist as to the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers under this or any other contract. This clause is to be read in conjunction with all other indemnity provisions contained in this Agreement. Any conflict or ambiguity arising between any indemnity provisions in this Agreement shall be construed in favor of indemnified parties except when such interpretation would violate the laws of the state in which the job site is located. Contractor shall reimburse the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers for any and

all legal expenses and costs incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Contractor's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers.

Insurance Requirements

The Contractor shall not commence work under a contract until he has obtained all insurance required under this paragraph and has filed certificates thereof with the Owner, nor shall the Contractor allow a Subcontractor to commence work until all similar insurance required has been so obtained and filed with the Contractor. Unless otherwise specified in this Agreement, the Contractor shall, at its sole expense, maintain in effect at all times during the performance of the Work, insurance coverage with limits not less than those set forth below with insurers and under forms of policies set forth below.

Worker's Compensation and Employers Liability Insurance - The Contractor shall cover or insure under the applicable labor laws relating to worker's compensation insurance, all of their employees in accordance with the law in the State of Wisconsin. The Contractor shall provide statutory coverage for work related injuries and employer's liability insurance with limits of \$1,000,000 each accident, \$1,000,000 disease policy limit, and \$1,000,000 disease each employee.

Commercial General Liability and Automobile Liability Insurance - The Contractor shall provide and maintain the following commercial general liability and automobile liability insurance:

Coverage – Coverage for commercial general liability and automobile liability insurance shall be at least as broad as the following:

1. Insurance Services Office (ISO) Commercial General Liability Coverage (Occurrence Form CG0001)
2. Insurance Services Office (ISO) Business Auto Coverage (Form CA0001), covering Symbol 1 (any vehicle)

Limits -The Contractor shall maintain limits no less than the following:

1. General Liability - One million dollars (\$1,000,000) per occurrence (\$2,000,000 general aggregate if applicable) for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the project/location (with the ISO CG 2503, or ISO CG 2504, or insurer's equivalent endorsement provided to the City of Racine) or the general aggregate including product-completed operations aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability- One million dollars (\$1,000,000) for bodily injury and property damage per occurrence limit covering all vehicles to be used in relationship to the Agreement.
3. Umbrella Liability- One Million dollars (\$1,000,000) for bodily injury, personal injury and property damage per occurrence in excess of coverage carried for Employers' Liability, Commercial General Liability and Automobile Liability as described above.

Required Provisions - The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. The City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers are to be given additional insured status as respects liability arising out of activities performed by or on behalf of the Contractor; on products and completed operations of the Contractor; for premises occupied or used by the Contractor; and on any vehicles owned, leased, hired or borrowed by the Contractor.
2. The coverage shall contain no special limitations on the scope of protection afforded to the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers.
3. For any claims related to this project, the Contractor's insurance shall be primary insurance as respects the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers. Any insurance, self-insurance, or other coverage maintained by the City of Racine, its elected and appointed officials, officers, employees, or authorized representatives or volunteers shall not contribute to it.
4. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers.
5. The Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
6. Each insurance policy required by this agreement shall state, or be endorsed to state, that coverage shall not be canceled by the insurance carrier or the Contractor, except after sixty (60) days (or 10 days for non-payment of premium) prior written notice by U.S. mail has been given to the City of Racine.
7. Such liability insurance shall indemnify the City of Racine, its elected and appointed officials, officers, employees or authorized representatives or volunteers against loss from liability imposed by law upon, or assumed under contract by, the Contractor for damages on account of such bodily injury (including death), property damage, personal injury, completed operations, and products liability.
8. The general liability policy shall cover bodily injury and property damage liability, owned and non-owned equipment, blanket contractual liability, completed operations liability with a minimum of a 24 month policy extension, explosion, collapse, underground excavation, and removal of lateral support, and shall not contain an exclusion for what is commonly referred to by the insurers as the "XCU" hazards. The automobile liability policy shall cover all owned, non-owned, and hired vehicles. All of the insurance shall be provided on policy forms and through companies satisfactory to the City of Racine, and shall have a minimum A.M. Best's rating of A-VII.

Deductibles and Self-Insured Retentions - Any deductible or self-insured retention must be declared to and approved by the City of Racine. At the option of the City of Racine, the insurer shall either reduce or eliminate such deductibles or self-insured retentions.

Evidences of Insurance - Prior to execution of the agreement, the Contractor shall file with the City of Racine a certificate of insurance (Acord Form 25-S or equivalent) signed by the insurer's representative evidencing

the coverage required by this agreement. Such evidence shall include an additional insured endorsement signed by the insurer's representative. Such evidence shall also include confirmation that coverage includes or has been modified to include all required provisions 1-8.

Responsibility for Work - Until the completion and final acceptance by the City of Racine of all the work under and implied by this agreement, the work shall be under the Contractor's responsibility care and control. The Contractor shall rebuild, repair, restore and make good all injuries, damages, re-erectments, and repairs occasioned or rendered necessary by causes of any nature whatsoever.

Sub-Contractors - In the event that the Contractor employs other contractors (subcontractors) as part of the work covered by this agreement, it shall be the Contractor's responsibility to require and confirm that each sub-contractor meets the minimum insurance requirements specified above.

END OF DETAILED SPECIFICATIONS

Proposer's Certification

I hereby certify that all statements herein are made in behalf of:

Name of Corporation, Partnership or Person submitting proposal

a corporation organized and existing under the laws of the State of:

a partnership consisting of: _____

an individual trading as: _____

of the City of _____ State of _____

that I have examined and carefully prepared this proposal from the plans and specifications and have checked the same in detail before submitting this proposal; that I have full authority to make such statements and submit this proposal in its (their) behalf, and that said statements are true and correct

SIGNATURE: _____

TITLE: _____

Sworn and subscribed to before me

this _____ day of _____ 20_____.

(Notary or other officer authorized to administer oaths)

SEAL:

My commission expires _____