

REQUEST FOR PROPOSALS
Pine County Auditor-Treasurer
Tax and CAMA Proposal

RFP Submittal: Proposals shall be submitted by 4:00 p.m., March 26, 2021

Mail or deliver to:

Pine County Administrator's Office
Attn: Deb Gray
635 Northridge Drive, Suite 200
Pine City MN 55063.

Proposals shall be sealed and marked "Tax and CAMA Proposals".
Proposals shall include three (3) printed copies and one (1)
electronic version.

1. INTRODUCTION

1.1 Pine County is soliciting Proposals from qualified companies to provide a Minnesota specific property records, property tax calculation and collection and computer aided massed appraisal (CAMA) system.

1.2. The proposal shall include all costs for a complete solution that consists of all accessories and options, services for the storage, management and maintenance for a period of 5 years. The proposal must also include initial training and implementation.

1.3. The proposal shall include both an on-premise storage option and a cloud storage option with individual costs for each option and a description of the functionality differences of each option.

This RFP is issued for Pine County, Minnesota. The points of contact are:

Kelly Schroeder
Kelly.Schroeder@co.pine.mn.us
County Auditor-Treasurer

Ryan Findell
Ryan.Findell@co.pine.mn.us
IT Manager

Pine County reserves the right to accept or reject any or all proposals, to waive any informality and irregularities, to negotiate separately with competing Vendors and to accept the proposal deemed to be in the best interest of the County at the county's sole discretion.

2. PROJECT BACKGROUND

2.1. Pine County has operated on the same AS400-based property tax and CAMA system for approximately 30 years. Due to the current system being at end-of-life December 31, 2023, Pine County is seeking a single vendor property tax and CAMA technology solution that includes property records maintenance, property tax calculation and collection, and CAMA system.

2.2. The intent of this proposal will provide Pine County with a current technology in a unified solution to ensure accuracy and enhance efficiency.

2.3. Pine County is a local county government located in Pine City, MN with approximately 28,500 taxable parcels and 30,500 parcels in total.

3. KEY OBJECTIVES AND WORK TASKS

3.1. Key objectives and work tasks important to successfully completing the project are described below. Responders are encouraged to suggest refinements or additional task activities that will contribute to the success of the project. Respondents should identify all features and capabilities of their property tax and CAMA technology solution and complete the System Requirement Assessment.

3.1.1. Implementation Activities: The proposal should reflect the Responder's approach to implementation, quality assurance and coordination of activities with the County.

3.1.2. Equipment Delivery Guarantee: Responders will adhere to the guaranteed delivery date.

3.1.3. System Configuration and Setup: The successful Respondent shall provide detailed system configuration, installation and implementation services.

3.1.4. Training: The successful Respondent shall provide a complete training program designed for system users, supervisory, administrative and management personnel.

3.1.5. Support and Maintenance: The successful Respondent shall provide technical support by phone or web platform and ongoing maintenance of the system for the contract period of five (5) years.

4. RESPONDER'S RESPONSIBILITIES/DELIVERABLES

4.1. The following items, pending further negotiation of the Scope of Work, are considered as deliverables that the Responder will provide:

4.1.1. The supplier will supply all software by the guaranteed delivery date included in the timeline of this RFP.

4.1.2. The supplier will provide and maintain the system used by the client including responding to and implementing the Minnesota Department of Revenue and Legislative requirements in regards to Tax/CAMA system and meeting deadlines. This may and likely will include customized solutions to meet new annual or biennial Legislative changes.

4.1.3. The cloud hosted solution will be maintained at a minimum 99% uptime/availability 24 hours a day, 7 days a week, 365 days a year.

4.1.4. The supplier will respond to support requests within the agreed upon time limits.

4.1.5. The supplier will take steps to escalate and resolve issues in a timely manner.

4.1.6. The supplier will maintain good communication with the client at all times throughout implementation and the full life of the contract.

4.1.7. The supplier will offer unlimited data storage and unlimited software licenses.

4.1.8. The supplier is responsible for onsite training and ongoing training for changes. We plan on using a train-the-trainer method of training all end users.

5. COUNTY'S RESPONSIBILITIES

5.1. Upon signing of a contract Pine County agrees to:

5.1.1. Use the supplier-provided system as intended.

5.1.2. Maintain power and internet connectivity at all locations on the network, and provide internet connectivity at supplier provided access points, with a minimum speed of 50 Mbps.

5.1.3. Notify the supplier of issues or problems in a timely manner.

5.1.4. Provide the supplier with access to equipment, software and services for the purposes of implementation, maintenance, updates and fault prevention.

5.1.5. Maintain good communication with the supplier at all times.

6. CONDITIONS FOR WORKING ONSITE

6.1. All Respondent's personnel must check in and check out daily when working in any Pine County location.

6.2. Standard work hours are Monday through Friday 8:00 a.m. until 4:30 p.m. Work outside those hours must be prearranged.

7. RFP SCHEDULE

7.1. Pine County reserves the right to modify these dates if extenuating circumstances necessitate.

DATE TIME ACTIVITY

January 20, 2021 – RFP is released on the Pine County Website and sent to all known Tax and CAMA vendors operating in Minnesota which provide both services.

February 19, 2021 – Questions are due by 4:00 PM CST.

March 5, 2021 – Anticipated answers to questions are released.

March 26, 2021 – RFP responses are due by 4:00 PM CST.

TBD Vendor Demonstrations, if deemed necessary by the Department.

May 18, 2021 – Contract Awarded

6.2 Project Milestones:

Action	Date
Contract Fully Executed	July 1, 2021
Data Conversion Mapping	January 1, 2022
Data Conversion Completion	September 1, 2022
Software setup and on-site training	January 1, 2023
Implementation and system fully operational	October 1, 2023

8. TECHNICAL PROPOSAL

The technical proposal prepared in response to this RFP shall contain at a minimum the following information and shall be organized in the following manner:

8.1.1. The name, address, Duns number, and contact information of the firm submitting the RFP and identification of a parent company, if any;

8.1.2. The name, office location, qualifications, and experience of the individual who would be the overall project manager as well as any other team members, partners or sub-contractors contributing to the project. Include identification of similar work performed by these individual(s) in the last three to five years.

8.1.3. A discussion of the Respondent's understanding of the project. Include a list of the top 5 concerns/risks your firm associates with this project and a plan to mitigate those risks;

8.1.4. A chart or table illustrating the Respondent's assessment of key milestones in the project and an anticipated timeline for reaching those milestones.

8.1.5. A specific description of the support that must be provided by the County for the Responder to successfully and expeditiously carry out the work plan described above.

8.1.6. The response to items 1 through 5 in this list shall be limited to 7 numbered pages not counting the transmittal letter, table of contents or any title pages; summaries of projects illustrating similar work may also be placed in an Appendix and will not count towards the 7-page limit but should be limited to the no more than five recent and relevant projects with contact information.

8.1.7. Software Capabilities Respondent should include all software capabilities including but not limited to:

- Data conversion from existing systems
- Property records, property transfer, property splits and combines
- Property tax calculation, collection, adjustment, and settlement
- Property classification, homestead, and special programs maintenance
- Special assessment and solid waste assessment
- Property tax forfeiture and confession of judgement process
- Escrow and ACH payment capabilities
- Building, extra feature, land, and income valuation
- Minnesota sales ratio analysis with time trends
- Robust reporting capabilities
- Timely Legislative and Minnesota Department of Revenue required updates
- If non-integrated Tax and CAMA solutions, an interface between systems.

8.1.8. Hardware Capabilities Respondent should include all software capabilities including but not limited to:

- Required server specifications
- Warranty information
- Repair turn around time
- Hardware installation plan (awarded vendor will coordinate work with Pine County IT department)

9. COST PROPOSAL

The cost proposal prepared in response for this RFP shall contain the following:

9.1.1. A firm, not to exceed price for the complete scope of services described in the Responder's Technical Proposal. Include a specific breakdown costs based upon the mileposts and deliverables as described in the Technical Proposal. Respondent should include other incentive options or value add options if applicable.

9.1.2. An estimated, not to exceed price for reimbursable expenses. These expenses shall be reimbursed at the current IRS rates, and per diem amounts.

9.1.3. Rates that will be applied to the calculations of additional work if such work is authorized by the County. Include hourly rates for each of the project team members as well as rates for the cost of reimbursable expenses.

9.1.4. The cost proposal shall have the following payments available

9.1.4.1. Hardware and software cost and first year maintenance

9.1.4.2. Annual maintenance cost for the remaining 4-year term, by year

10. MODIFICATION OR WITHDRAWAL OF PROPOSALS

10.1. Proposals shall be valid for 60 days after the due date.

11. PROPOSAL EVALUATION

11.1. The initial evaluations will be based on the content of the Proposals. The proposals will be ranked based on the following factors (weighting of each factor listed in parenthesis):

11.1.1 Expressed understanding of the project, key objectives, implementation strategy and training program (15%);

11.1.2. Assessment of the proposed key milestones, project timeline and work tasks proposed for the project (10%);

11.1.3. Assessment of the proposed vendor qualifications, experience with similar projects, appropriate resources allocated to the project, references (15%);

11.1.4. Assessment of the overall project cost estimate on a comparative basis to the other proposals (30%).

11.1.5. Software and Hardware capabilities and ease of use (30%)

11.2. A Duns report may be requested and evaluated to determine Respondent's level of responsibility as it relates to financial stability and legal activity.

11.3. The County reserves the right to award the contract to the Responder whose proposal provides the overall greatest value to the County. The award may not be determined by price alone.

11.4. Contract negotiations related to the scope of work may proceed following selection of the apparent successful proposal, if necessary. The content of this RFP and the successful Responder's proposal will become integral parts of the contract

but may be modified by the provisions of the contract. If a contract, for any reason, cannot be negotiated, another Responder may be selected.

11.5. Any protest regarding the evaluation, recommendation or award of proposals shall be filed no later than five (5) calendar days after the electronic notification of award has been sent. Protests shall be addressed to the County Administrator and be delivered electronically to David.Minke@co.pine.mn.us

11. Insurance / Liability

Provide proof of insurance for general liability and professional responsibility/errors and omissions. All insurance policies must be issued by companies authorized to do business under the laws of the State of Minnesota.