

**STATE OF NEW YORK**

**DEPARTMENT OF TAXATION AND FINANCE**

**Office of Budget & Management Analysis**

**Bureau of Fiscal Services**

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**June 30, 2014**

**Amendment #2**

**For Request for Proposals (RFP) 14-04 Real Property Tax Administration System Solution**

To All Potential Bidders:

Attached are the Department’s responses to Questions received for the above referenced RFP.

The Department is issuing Amendment #2 as clarification for:

* Amend the Contract end date in Preface, I. Contract Signing and Contract Term ;
* Correct Exhibit D – Letter of Deliverable Rejection; and
* Correct Attachment E- Functional Requirements Response Form.

Corrected pages are attached to this document. All deletions are shown as shaded, strike-through text, all additions are made in red text.

All other requirements and conditions remain as indicated in the RFP.

| **#** | **RFP Section** | **RFP Page #** | **Question** | **Answer** |
| --- | --- | --- | --- | --- |
| 1 | Preface, Section F | 10 | We will provide the trial software site with the converted test data, but that site will not have complete functionality due to the limits of the data provided. For example, the trial site will not have comp sales, fully functional GIS, images and other features that are part of our proposed solution. In addition to the trial site, we could provide a more fully functional demonstration site that would not use the State’s test data, but would allow for a more complete review and analysis of our proposed solution. Would this be acceptable? | This is acceptable. |
| 2 | Preface, Section F | 10 | What are your expectations for the software trial? | For the State, to gain a better understanding, through hands-on use of the proposed products. |
| 3 | Attachment E | 214 | Please clarify the instructions for the Attachment. If the response to a requirement is to check the  “SR” column –meaning “Provided with Standard Report or Reporting Tool” – that would seem to be a sufficient response. However, the instructions include “NOTE: For codes other than F or N, level of severity of the change must be stated.”  Is it the intent that in this case the Vendor should check both the F and SR columns? | Please see Amended page 214. |
| 4 | Attachment E, Section E: GIS Requirement 1.a. | 266 | “The ability to convert State Plane Feet coverage’s to Universal Transverse Mercator” – can you please clarify the intent of this requirement as this is typically handled by the GIS server or GIS tools? | The intent of this specific requirement was to ensure the GIS function and/or tool set provided as part of the solution allows for this data conversion and/or equivalence as a portion of its inherent capability. |
| 5 | Attachment E, Section D: Valuation Requirement 10 | 259 | “Project Table Maintenance – See Exhibit 43 Sample Project Table Management Reports  The system shall provide the ability to create, maintain, remove and assign specific valuation options (Projects) to a site or group of sites for use in parcel valuation. Projects can then be assigned to sites either through regular parcel maintenance or through a batch assignment process. Parcel valuation will not process a parcel unless it has a valuation project assigned.”  Is the Project Table essentially a way of assigning a valuation model to a group of properties within RPS? | The RPSV4 Valuation Project Table (see Database Definition - table VALUATION\_PROJECT) contains a collection of identifiers which relate to named valuation options, parameters and other process specific information relative to each of the approaches to value.  Each parcel intending to be introduced to a valuation process (cost, market, income) must have a Valuation Project assigned and that Valuation Project must contain defined options for the desired methodology.    The Database Definition is referred to on page 228.  http://www.tax.ny.gov/research/property/assess/rps/dblayout/default.htm  The RPSv4 on-line help has more details, see Project Table Maintenance. |
| 6 |  |  | The RFP states that you intend to have the first phase of the software live by December 2015.  The experience Thomson Reuters has in Tax and CAMA solutions has provided us with a strong understanding of the time it takes to implement this software to ensure its success.  Given the size and scope of this RFP, we do not believe the implementation can be completed by any vendor within the timeframe stated in the RFP.  Is this timeframe a litmus test for vendors who can respond, or are the go-live dates as stated in the RFP flexible?  In addition, given the amount of implementations we are currently working on, we would not be able to start this project until early 2016 with Phase 1 going live in 2017.  Are the aforementioned go-live dates flexible to fall within Thomson Reuters proposed parameters? | Please see the revised dates in the Amendment issued June 13, 2014. |
| 7 |  |  | ***To bid this project, do we need to have experience in real property tax administration system. We have experience employing multi-tier web-based solutions, which utilize technologies such as HTML5 and some others.*  Attachment B – Qualifying Experience Response Form**  This form is for the Real Property Tax Administration System Solution experience as specified in Section IV. B. Failure to provide sufficient detail to the mandatory topics of this section will result in the Bidder’s proposal being deemed non-responsive and removed from further consideration.  The Bidder must have experience employing multi-tier web-based solutions, which utilize technologies such as HTML5. The Bidder must have experience with two (2) Contracts for the delivery of a Real Property Tax Administration System Solution which employs a thin client, middleware services, a back-end enterprise database data tier within a multi-tenant infrastructure, within the past three (3) years. The solutions resulting from the two (2) Contracts must have surpassed the system development life cycle, and be in a state of maintenance. | Yes, as per Section IV. Qualifying Requirements, B. Qualifying Experience – “The Bidder must have experience with two (2) Contracts for the delivery of a Real Property Tax Administration System Solution which employs a thin client, middleware services, a back-end enterprise database data tier within a multi-tenant infrastructure, within the past three (3) years.” |

## Submission of Proposals

The Bidder must submit their proposals as instructed in **Section X, Proposal Submission**.



## Bidder’s System Presentation

All Bidders who pass Phase One of the evaluation process will be required to participate in a system presentation as outlined in Section XI. Proposal Evaluation, 2. Evaluation Process Overview, b. Phase Two Evaluation, iii. ~~System~~ Solution Presentation.



## Contract Signing and Contract Term

**The Bidder must agree to sign a contract within thirty (30) days of Notification of Award. If the Bidder fails to do so, the Department reserves the right to begin negotiations with the next highest ranked Bidder.** The Preliminary Contract will be posted to the Department’s web site by the date specified in the Schedule of Events. Any exceptions or additions to the terms and conditions of the Preliminary Contract must be identified in the Bidder’s proposal. The Department will not sign any vendor supplied contract documents. As such, if there are specific terms to be included in the final Contract, they must be submitted in response to **Section IX.B.20**. Software License Agreement terms are expressly made subject to negotiation to comply with the terms of the RFP and Preliminary Contract. License terms will be made part of the Contract only as negotiated and agreed to between the State and the Contractor.

The Department will award one Contract to the successful Bidder for an initial term commencing upon approval of the New York State Attorney General and the Office of the State Comptroller through ~~December~~ ~~March~~ August 31, 2018~~7~~, with the ability to extend the contract for one (1) five (5) year term, for support and maintenance only. Note: Change Orders to modify the system to accommodate changes (ex. Legislative, policy, procedure, etc.) are considered maintenance of the system.

# Exhibit D - ~~Sample~~ Letter of Deliverable Rejection

~~Rejection Letter~~

*Date*

*To:* **< Contractor >**

*From*: **< State Project Manager >**

*Re*: *Rejection of Deliverable* **< #XXX, Deliverable Name >**

*This letter serves as notification that your deliverable* **< deliverable name and number >** *~~has not met our agreed upon expectations and is rejected as of~~ rejected as of* **< rejection date >.** *You have* **< xx days/weeks/months *>*** *to rectify the defects noted below.*

**< Specific reasons for rejection go here. Reference the deliverable comment form as appropriate. >**

**< Special instructions or next step specific to the deliverable and/or vendor go here. Describe the process to resubmit the corrected deliverable. >**

*Please retain a copy of this letter for your records. Any questions can be directed to* **< Person Name >, < Contract Manager or State Administrative Manager >.**

*Thank you ~~for your valued contributions to our joint success~~,*

< State Project Manager Name >

< Project Name > State *Project Manager*

# Attachment E – Functional Requirements Response Form

For each requirement below, the Bidder must provide a narrative describing how their proposed solution will accommodate the requirement. In addition, the Bidder must identify how the requirement will be met utilizing the following coding:

* + - * + **F** Provided fully functional out of the box (no custom development, i.e., source code changes)
        + **CO** Provided fully functional with configuration (no custom development)
        + **CU** Customization/Software Enhancement (Any custom development)
        + **TP** Third-party Software Required to Fully Provide Requirement (Third-party Software Must be Proposed)
        + **SR** Provided with Standard Report or Reporting Tool
        + **CR** Custom Report Development Required
        + **N** Not Included in this Proposal

**Note: For codes other than “F” ~~or~~ ,“N” or “SR”, the Bidder must indicate the level of severity of the change utilizing “H” for high, “M” for Medium or “L” for low.**

| **Requirement No.** | | | **Requirement Status**  **M=Mandatory**  **D=Desirable** | **Requirement** | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Note: Failure to provide sufficient detail to the mandatory topics of this section will result in the bidder being deemed non-responsive and removed from further consideration.** | | | | | | | |
|  | | | | | **F** | **CO** | **CU** | **TP** | **SR** | **CR** | **N** |
|  | | | | | | | | | | | |
| **Functional Requirements** | | | | | | | | | | | |
| * 1. **Individual Parcel Maintenance (M)** | | | | | | | | | | | |
|  | **Parcel – See Exhibit 1 – Sample Parcel Information** | | | | | | | | | | |
|  | | Narrative to describe solutions Individual Parcel Maintenance capabilities: | | | | | | | | | |
|  | | | | | **F** | **CO** | **CU** | **TP** | **SR** | **CR** | **N** |
| 1.a. | | | M | The system must provide for creation of a parcel in accordance with a defined map section, sub- |  |  |  |  |  |  |  |