

Request for Information (RFI) 12-15  
Real Property Tax Administration System Solution

October 1, 2012

The New York State Department of Taxation and Finance (the “Department”) is requesting qualified vendors to supply the Department with information which may be used when considering a replacement for its existing real property tax administration solution (RPSV4).

This is a Request for Information (RFI) only. This RFI is issued solely for information and planning purposes – it does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future. Respondees are advised that the Department will not pay for any information or administrative costs incurred in response to this RFI. All costs associated with responding to this RFI will be solely at the respondents’ expense. Not responding to this RFI does not preclude participation in any future RFP, if issued.

**Timeline**

<b>Event</b>	<b>Date</b>
Issuance of RFI	October 1, 2012
Deadline for Submission of Vendor Questions	October 22, 2012
Department’s Response to Vendor Questions	November 13, 2012
Vendor Response Due	December 3, 2012

**RFI Questions**

The vendor community will have an opportunity to submit written questions regarding this RFI. All questions regarding this RFI should be submitted via e-mail (preferred), fax or mail and must be received by the date specified in the timeline. Questions received after this date will not be responded to.

E-mail:                      bfs.contracts@tax.ny.gov

Fax:                            (518) 435-8413

Written Correspondence:

New York State Department of Taxation and Finance  
Attn: Catherine Golden, Director  
Procurement Services Unit  
WA Harriman State Campus  
Albany, NY 12227

The Department will provide a written response to all questions received by the date specified in the timeline. Responses to Vendor questions will be posted on the Department’s Procurement website at:

<http://www.tax.ny.gov/about/procure/>

## **NYS Department of Taxation and Finance Background**

The Department of Taxation and Finance is responsible for the collection of tax revenue and the provision of associated services in support of government operations in New York State. In fulfilling its responsibilities, the Department collects and accounts for approximately \$60 billion in State taxes and nearly \$40 billion in local taxes; administers 37 State and nine local taxes, processes almost 28 million returns, registrations, and associated documents; and oversees the local property tax administration. The Department also manages the State Treasury, which provides investment and cash management services to various State agencies and public benefit corporations, and acts on the Commissioner's behalf as the joint custodian of the State's General Checking Account.

## **Description of the Office of Real Property Tax Services**

The Office of Real Property Tax Services (ORPTS), a division within the Department, is the division that oversees local property tax administration. This division works directly with county and municipal officials to improve the fairness of property assessments. As part of its responsibilities, ORPTS developed, maintains and supports a software solution called the Real Property System (RPS) which it currently licenses to 95% of the assessing units in NYS for their use in assessment administration.

## **Objective**

The Department is researching opportunities for a replacement for its current Real Property System (RPSV4). The current system is primarily used for local assessment administration. In addition to assessment administration, the Department is interested in expanding the scope of its system to include other areas critical to the overall administration of real property taxes in NYS. These additional areas include but are not limited to filing and processing of real property sales related information; providing improved public access to state-wide real property related information; improved integration of local real property related data with the Department's personal income tax data for use in determining STAR eligibility; and real property tax billing and collection.

It is the objective of this solicitation to canvas suppliers of software solutions related to the administration of real property taxes in NYS for possible alternatives that could be used as a replacement for the Department's current RPSV4 software.

The Department is seeking information from Vendors who can offer both partial and/or whole solutions. Responses may be used to assist the Department in a development of any future bid document.

## Vendor Solutions

The Department is open to any and all solutions the vendor community may have. The Department is seeking solutions which have the following attributes:

- Is fully compliant with the provisions of Real Property Tax Law in NYS:  
<http://public.leginfo.state.ny.us/menugef.cgi?COMMONQUERY=LAWS>  
Proposed solutions should be modifiable in a timely manner to accommodate frequent legislative changes related to Real Property Tax Administration in NYS thereby allowing users to remain legislatively compliant.
- Supports the business of local assessment administration.
- Contains, at a minimum, the existing local assessment administration functionality within the Department's RPSV4 system. The Department is currently under contract with Marshall and Swift which provides the primary source data needed to support the existing RPSV4 valuation component. Vendors' systems would be expected to make use of this existing Marshall and Swift data. In addition to this existing assessment administration functionality, the Department seeks a solution which facilitates, or can be made to facilitate, enhanced GIS capability, improved image management, an integrated sketching package and the ability to use handheld devices for improved local inventory collection. Vendors should refer to the Department's website to determine the primary components of the existing RPSV4 system:  
[http://www.tax.ny.gov/research/property/assess/rps/support/WebHelp/RPSV4\\_Web\\_Help.htm](http://www.tax.ny.gov/research/property/assess/rps/support/WebHelp/RPSV4_Web_Help.htm)
- Is consistent with the Department's strategic objectives concerning the consolidation and centralization of all real property tax administration related functions. Should provide for housing, administration and support of both the application and associated database(s) at a central location(s); could accommodate both a multiple county or single state centric processing model; should accommodate robust remote printing. Users would access the system and associated database(s) remotely via the web.
- Reduces the overall costs (both state and local) of Real Property Tax Administration in NYS through consolidation of services and reductions in deployment, support and infrastructure costs.
- Provides for data security that meets the Department's standards. All computer systems developed and the Department is required to meet NYS Office of Cyber Security (OCS) guidelines/policies/standards. This is a minimum standard and the Department may choose to require higher levels of security: <http://www.dhSES.ny.gov/ocs/resources/>
- Is scalable as a statewide centralized solution for 1000 assessing units in NYS containing approximately 5.5 million parcels.
- Supports other critical business functions associated with overall real property tax administration in NYS.
- Facilitates public access to state-wide real property tax related information and online filing of various forms and applications.
- Facilitates transition to a "paperless" environment for all users (the Department, local governments and taxpayers) of the real property tax administration system in NYS.
- In addition to basic assessment administrative functions, must also meet, or can be made to meet, the needs of internal Department users. These needs include but are not limited to the valuation of complex properties, valuation of forested properties and the administration of the Department's taxable state land program.
- Facilitates, or can be made to facilitate, the integration of the Department's personal income tax related data with locally maintained real property tax related data.
- Facilitates, or can be made to facilitate, the integration of local and Department efforts related to the filing and processing of real property related sales information.
- Accommodates the possibility of future shared service agreements between the Department and local taxing jurisdictions as it relates to billing, collection and distribution of real property taxes.

## **Information Requested**

### 1. Description of Vendor Solution.

Please provide an overview of any existing solution for real property tax administration in NYS you currently have. If your current solution does not meet one or more of the system attributes described above, please explain what you would do to make your existing system compliant with the stated desired system attributes. If you do not have an existing solution, please explain what you would do to develop one.

### 2. Security Controls.

Due to the potentially sensitive nature of some of the information being contained and possibly warehoused (for example SS# for real property owners), please provide an overview on how your solution protects information from breach and unauthorized access.

### 3. Pricing.

Please provide information concerning costs associated with your solution including the licensing model(s) employed. If you use a sliding scale, please be sure to indicate how that scale works. Please provide all pricing structure related to your solution (i.e. start-up costs, implementation costs, data conversion costs, maintenance costs, support costs, user training costs, costs associated with housing the solution, etc.).

### 4. Additional Comments/Information.

Please provide any additional information that you feel would be beneficial to the Department in researching possibilities when considering a replacement for its existing real property tax administration solution (RPSV4).

### 5. Answers to Specific Department Questions.

As part of any written response to this RFI, please provide a response to all of the following questions:

- Are you familiar with the Departments RPSV4 system? (Yes or No) If Yes, how are you familiar with the RPSV4 system?
- Is your existing solution currently deployed in NYS? (Yes or No) If Yes, where? Please provide a contact person for each client you have in NYS. If you have more than three clients, only provide contact information for three clients.
- How long have you been providing this type of solution for real property tax administration?
- Describe the process you use for responding to discretionary user requests, bug fixes and/or mandated legislative changes affecting your solution.
- Do you have a video presentation of your current solution that you could provide to the Department?
- Would you be willing to demo your solution for Department staff?
- Please describe the overall architecture of your solution listing both front-end and back-end tools used and the user authentication process employed.
- Please describe any minimum software/hardware requirements associated with your solution.
- Does your solution provide for data warehousing?
- What do you see as the strongest attribute of your solution? What is the weakest?

**RFI Response**

Please respond to this RFI by December 3, 2012. Be sure to provide the name, location, contact person, phone number and e-mail address for your company.

Your response to this RFI should be submitted via e-mail (preferred), fax or mail:

E-mail:                      bfs.contracts@tax.ny.gov

Fax:                              (518) 435-8413

Written Correspondence:

New York State Department of Taxation and Finance  
Attn: Catherine Golden, Director  
Procurement Services Unit  
WA Harriman State Campus  
Albany, NY 12227

A response does not bind or obligate the responder or the Department to any agreement of provision or procurement of any products referenced.