

**Request for Proposal**

**Computer Assisted Mass Appraisal, Assessment  
Administration and Tax Administration System**

**for**

**Mason County Washington**

*Assessor / Treasurer*

**Proposals must be returned by 4:30 p.m.**

**October 2, 2006**

**To**

**Mason County Board of County Commissioners**

**411 North Fifth St.**

**Shelton, WA 98584**

## General Information

Mason County is located in the Puget Sound region of Washington State, and is made up of:

- 53,984 Real Estate parcels
  - 45,893 Residential
  - 4,413 Commercial
  - 6,595 Mobile home
- 1,025 Personal Property records
- 302 Real and Personal Utility
- 45,162 Conservation District accounts
- 5,576 Benefit Assessment accounts
- 1,105 Lake Management Assessment accounts



Mason County assumes 20 users in the Assessor's office, 12 users in the Treasurer's office, and 20 users in various other offices. In addition, vendor is expected to propose a public access solution.

## Submittal Due Date

To be eligible for consideration, five (5) copies of a vendor's response to this Request for Proposal (hereafter called "response" or "proposal") must be received by the Mason County Board of County Commissioners, 411 N. 5<sup>th</sup> St., Shelton, Washington 98584 no later than 4:30 PM, October 2, 2006. The response must be submitted in a sealed envelope with the Request for Proposals for Assessor & Treasurer Software Function and the due date clearly identified on the outside.

## **Expected Term of Resulting Agreement**

The initial contract period is anticipated to be for a period of two (2) years, unless sooner terminated as provided elsewhere in the Agreement. The contract shall be renewed annually for additional one year terms, unless either party gives notice of non-renewal not less than 30 days prior to the expiration of any one year term.

## **Format of submittal**

Proposals should contain the following items:

- Cover letter
- Cost summary
- Company summary
- Proposed schedule
- References
- Response to system requirements

## **Evaluation of Proposals**

Award shall be made in the best interest of the County as determined by the Assessor and Treasurer Procurement Committee or their designees. Consideration may focus toward, but is not limited to:

- Cost of system and implementation
- Response format as required by this Request;
- Adequacy and completeness of proposal;
- Vendor's understanding of the project;
- Compliance with the terms and conditions of the Request;
- Experience in providing like services;
- Timeline and Methodology to accomplish tasks
- Adherence to Specifications

## **Purpose of Request for Proposal**

### ***Objective***

The objective of the Mason County Assessor-Treasurer is to acquire a Computer Assisted Mass Appraisal (CAMA) system, an Assessment Administration system, an Tax Administration system, and a Revenue Receiving System that will be able to transfer revenue data into the county's Financial Management System. Applicants must respond with an integrated solution including all four components. It is our goal to replace our existing systems.

## **Scope**

The County is interested in procuring a Computer Assisted Mass Appraisal (CAMA), Assessment and Tax Administration system application software which can best address the functional and performance requirements as stated within this document. Software that lacks the capability to fully comply with these requirements must be identified in the proposal. The system will be used to perform the annual assessment of all property in Mason County. The tax system will be used for billing, collecting and administration of property tax. Proposals shall include application costs, conversion and installation, training, documentation, support, annual maintenance/licensing costs (per seat/per server), and the costs to modify and/or enhance applications. The proposed system must include provisions for integrated sketching capability, accommodate digital photos, images, and be able to interface/communicate with the County's existing GIS, and other identified interfaces.

## **Pre-Qualification Criteria**

In order to expedite the RFP process for all concerned, specific qualification criteria have been developed. These criteria must be met in order to proceed further.

### **A. Vendor Qualifications:**

1. Vendors must supply a minimum of seven (7) references that have been utilizing the proposed software for at least 1 full year or complete assessment and tax cycle in a production environment.
2. Vendors must be willing to offer support for the software proposed for at least 5 years.
3. Vendors must be willing to provide a copy of the software Source Code to be held in escrow, with Mason County or with a third party, with Mason County having full rights to all code in the event the Supplier quits doing business.
4. Vendors agree to meet all timetable requirements contained in the requirements for proposal. Timetable (i.e. training, conversions, pilots, software adjustments, and cost table modifications).
5. Attach your standard implementation work plan including:
  - a. Installation, setup and customization
  - b. User and IS training
  - c. Data conversion
  - d. System testing
  - e. Other implementation tasks

## **B. Software qualification:**

1. Software must accommodate the Microsoft Windows desktop environment and TCP/IP network environment.
2. Software must meet warranty provision: Vendors agree to correct program error (bug) found in the software system at no cost to the licensee during the license period.
3. Vendor must agree to modify software as necessary to meet any current or new state mandated or legislative requirements in a timely fashion during the period of vendor maintenance. Vendor should offer a fixed hourly rate for future changes.
4. Vendor must specify all third-party license requirements.
5. Software must be compliant with business class, networked laser printers.

## **General Requirements of System**

1. Access to one relational database system that serves the informational needs of all Assessor-Treasurer staff.
2. Cross-department sharing of property owner names and addresses.
3. Cross-department sharing of property legal descriptions.
4. Integrated multi-level security, allowing controlled access to editing, updating, and deletion, on a name/password and group basis. Mason County prefers that the CAMA utilize Windows 2000 Active Directory for controlling access to its resources.
5. Change auditing to track all user changes to database.
6. System must provide all required reports.

## **CAMA / Assessment Administration requirements**

1. Provide for data management of all statutory requirements of a Washington County Assessor, including real and personal property management.
2. Provide valuation through the cost approach integrated with Marshall & Swift cost systems.
3. Provide valuation through the Income approach, including the creation and integration of Gross Rent Multiplier models.

4. Provide residential valuation through the Marketing model using comparables sales.
5. Sales comparables shall allow selection of Euclidean or Minkowski distance metrics.
6. Integrated sketch providing vector documentation of all physical improvements. Sketch function should automatically update corresponding CAMA fields.
7. Sketch function shall provide for multiple improvement site plans.
8. Allows appraisal for multiple revaluation areas, including revaluation year specific cost tables, market value land tables and current use value tables.
9. Includes appraisal tables for program property appraisal by use type and soil grade.
10. Maintains appraisal history, stores property characteristics for past years, while allowing appraisal work in future years.
11. Applies and calculates Senior Exemptions. Applies regular and excess levies to senior exempt parcels.
12. Calculates miscellaneous assessments including timber (fire patrol), Ground Water Management/Flood Control, and weed control.
13. Calculates and prints state-defined reports including abstract of assessment, certificate of assessment, stratification reports, certificate of new construction and senior relief report.
14. Maintains personal property records by tax roll year, incorporates Washington State Personal Property depreciation Schedules and allowing corrections of previous years without effecting current values.
15. Direct integration of CAMA and Assessment Administration

## **Tax Administration requirements**

1. Provide for data management of all statutory requirements of a Washington County Treasurer

2. Provide for the automatic update of information on the treasurer's side when the assessors' office processes supplements or cancellations to the roll.
3. Calculate interest due on refunds.
4. Handle the creation & collection of CID, RID, & ULID assessments.
5. Provide for the receipting of excise tax revenue, including the assignment of sequential affidavit numbers.
6. Provide the ability to be used as a search tool for excise affidavit information, i.e., allow for search by buyer or seller name, affidavit number, date filed, parcel number.
7. Provide the mechanism necessary to allow excise affidavits to be scanned and indexed.
8. Provide a concise audit trail for receipting and tracking over/short payments.
9. Provide for the ability to be used as a database to extract data to be transferred to Microsoft Word, Microsoft Excel, and Microsoft Access.
10. Provide for automatic logging of activity on parcels, i.e., refund check processed, parcel segregated, ownership changes, foreclosure warning sent, etc.
11. Allow for public access to information via the internet.
12. Provide the ability to mass receipt payments received via electronic reporting.
13. Allow for the daily transport of tax collections to the individual funds.
14. Provide clear and concise audit trails, and an adequate history of activity record.
15. Provide for export of property tax payment data to an existing revenue program.
16. Provide mechanism to extract and export tax roll information to mortgage companies.
17. Provide for annual export of Assessor's levy codes & fund factors.

## **Support systems**

1. Vendor must provide for toll-free technical support on all modules
2. Vendor must provide internet based tracking of user issues

3. Upgrades to the Mason County technical infrastructure may be required. You will be asked to provide a recommendation, and an estimate of the cost of the recommended infrastructure upgrade, for your proposed solution. However, Mason County will not necessarily include purchase of those upgrades in any future contract with the selected vendor(s).
  4. List and describe all means of providing the user with help. Include online help files, web-based support, paper documentation, context sensitive help, etc.
  5. Provide a sample project schedule (timeline) that begins with initial contract award, and ends with deployment.
- | 7.6. Describe your approach to successful data conversion. Where does your experience show that problems will likely be encountered (e.g., tax billing history, etc.)?
- | 8.7. Describe your company's approach to providing end-user training. Include two (2) copies of a sample of your training material.

## Rejection of Bids

- **Bids that are non-responsive or not timely submitted will be rejected.**
- This is an RFP for product and services, as such, the evaluation of the County as to the best package for the County's needs' will not be found solely on the lowest bid.