

**IROQUOIS COUNTY
REQUEST FOR PROPOSALS**

**REAL PROPERTY COMPUTER ASSISTED MASS APPRAISAL
SYSTEM**

FOR

IROQUOIS COUNTY, ILLINOIS

PROPOSALS MUST BE RETURNED BY:

4:00 p.m. CST
November 27, 2023

TO

**IROQUOIS COUNTY CLERKS OFFICE
ADMINISTRATIVE CENTER
1001 E GRANT ST, ROOM 104
WATSEKA, IL 60970**

IROQUOIS COUNTY, ILLINOIS REAL PROPERTY COMPUTER ASSISTED MASS APPRAISAL SYSTEM

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1.0 General Information and Project Goals

1.1 Introduction

This Request for Proposals (RFP) announces the Iroquois County, Illinois, Assessor's intent to purchase application software for a Computer Assisted Mass Appraisal (CAMA) system. The purpose of this RFP is to solicit proposals from vendors who can provide the CAMA system on a PC based platform running Windows 10 or higher.

1.2 Background Information

The Iroquois County Assessor currently does not have a CAMA system.

Iroquois County is 1,117 square miles in size and has an estimated population of 27,077. The county exceeds 28,000 parcels. The 2022 BOR abstract of assessments for the county is \$790,970,482.

Property taxes are collected as a result of budgeting by the local units of government with taxing authority. These taxing entities include school districts, community colleges, municipal governments, county government, natural resource districts and other smaller taxing entities.

1.3 Project Goals

Iroquois County intends to purchase a new CAMA software system for the Iroquois County Assessor that will automate the office, be user-friendly, dependable and potentially integrate with other related county government offices. The CAMA software must be able to communicate with other software currently being used in order to eliminate double entry.

The proposed system must be a PC based Windows Server 2022 or above platform and industry standard 64-bit processing. It must have ODBC architecture for GIS data exchange and it must be SQL compliant.

One of the long-term goals of the County is to position itself to achieve greater efficiencies in the work place and provide the public greater availability to information. The CAMA system will be used to facilitate the daily activity of the Assessor's Office in preparation for future State Mandated Reassessments.

2.0 Events/ Key Dates

<u>Events</u>	<u>Data / Time</u>
RFP Posted on County Website	November 7, 2023
RFP mailed/emailed to prospective vendors	November 7, 2023
RFP responses from vendors	November 27, 2023

3.0 Vendor Communications

After the RFP issue date and thereafter, all communications between vendors and Iroquois County must be in writing. No oral questions will be acknowledged or answered. Any questions must be submitted in writing or email by November 15, 2023 to Mia McCammon at the Iroquois County Assessor's Office, 1001 E Grant St, Rm 106, Watseka, IL 60970.

4.0 Vendor Experience and Capability

It is mandatory that the vendor shall provide a minimum of five (5) references. The top vendors will have references evaluated either by questionnaires sent to the referenced party or by telephone interviews. Where possible, the assessor and staff may visit operating systems in other counties or cities.

5.0 Requirements for the Computer Assisted Mass Appraisal (CAMA) System

The proposed system must be a PC based Windows Server 2022 or above platform and industry standard X86 64-bit processing. It must have ODBC architecture for GIS data exchange and it must be SQL compliant.

The following items itemize certain key elements that must be included in application(s) that will be purchased. The vendor must indicate, in an addendum, one of the following:

- (A) This feature is provided and fully meets requirement "out of the box",
- (B) Requires Customizations and modifications (specify what would be needed and estimate cost in an addendum)
- (C) This feature cannot be provided and does not meet requirement

Include any comments necessary to clarify your answer or any comments that you feel would help explain how your system addresses the requirements in an addendum.

5.1 CAMA Business Operations: Feature Description

Annual Requirements

- Ability to lock real estate data for update during year-end processing but maintain it as read-only.

Audit

- Ability to record modifications for all identified data elements to audit.
- Ability to view audit information.
- Ability to keep track of value changes by categories (new construction, additions, revaluation, and parcels, commercial versus res.) on a daily, monthly, and yearly basis.
- Ability to generate daily audit reports.
- Ability to provide a daily report of new parcels and parcel inactivation.

Base Parcel Details

- Ability to view and maintain sets of current records, projected records, and history records (up to three years old for purpose of correcting assessments current plus 3 yrs.). The record sets should include all the parcel details that were used to create each assessment.
- Ability to store and display projected, current year, and ten years of prior year history information.

Search

- Ability to query parcels by multiple methods in the database.
- Ability to create a custom search query to locate parcels. Also the ability to export result sets to a minimum of Microsoft Excel file format.

Unique ID (parcel identification number or PIN)

- Use query to make a scrollable set of parcels so Parcel numbers do not have to be entered.
- Route map number (locator)
- Deed Name
- Contract name
- Street number and name
- DBA (doing business as)
- PIN
- User initials
- Date of change
- Amount of change.

Illinois Classification scheme

- Allocate records per land basis
- Allocate records per building
- Allocate records per yard extra

Statistical Analysis

Ability to store assessment & sales history for use in Statistical Analysis

- Unlimited number of sales occurrences
- Sale date
- Sale amount
- Current assessed value
- Non-Useable Transaction Codes
- Recording
- Listing date
- Listing amount
- Ability to display a summary view of the Assessment History on a given parcel.
- Ability to select the details for a given assessment history and display the associated parcel details.
- Unlimited owners and addresses PER parcel.
- Ability to view and maintain ownership changes to a parcel.

Base Information

- Ability to display parcel change history.
- Allow for tax exemption classifications. (classification, designation)
- Ability to maintain special assessment district codes for all parcels within the district.
- Ability to include the necessary validations and verifications for quality control.
- Ability to maintain a condominium parcel that would not be considered an active parcel or included in the land book and parcel counts.
- Ability to maintain a rehabilitation code and description for parcels that have been accepted into a historical, residential, or commercial rehabilitation program. In addition to the code, information maintained will include effective date, beginning value, ending value and exempt value.

Parcel Characteristic Data

Capabilities to store parcel characteristic data as follows:

- Multiple land records per parcel
- Multiple buildings per parcel
- Multiple additions per building
- Multiple sketch diagrams per parcel
- Multiple photographs per parcel
- Capability to add addition to existing sketch diagrams to include year built info.

Land Segments

- Ability to view and maintain unlimited land segment information.
- Verify that deeded acreage on the parcel matches the total acreage of all land segments.
- When there is no deeded acreage, verification will be done against the GIS calculated acreage.
- Ability to link appropriate land segments to commercial bldg.'s for calculation of income approach to value and sales comp approach.
- Ability to identify land segments and buildings as wholly or partially exempt. This function will be used on partially exempt parcels.
- Ability to link exempt land segments to exempt building and taxable segments to taxable building for parcels that are partially exempt.
- Additional information listed on the land panel will be number of acres of flood plain.

Land Pricing

- Ability to utilize multiple methods of land pricing: i.e., Standard dimensions (FF) basis, site and excess basis, square foot basis, acre basis, acre range, lump sum basis, override lump sum value, agricultural soil grades (Illinois), and combinations of any of the above.
- Adjustments to land: topographic, economic, lump sum or other

Residential

- Unlimited building sections
- Ability to view a list (summary) of all building types on a parcel (year built, building use/name, model, value and building sequence).
- All building related data on one tabbed screen including rooms and depreciation.
- X, Y, and Z coordinates in situs. Unlimited per building
- Models to quickly create buildings including rooms, sketch, depreciation as well as building description.
- Ability to display main building details.
- Ability to add new buildings and delete, transfer, or edit existing buildings.
- Ability to add building info for valuation of partially complete structures using a %.
- Ability to select a given model for valuation of the building (Marshall Swift Cost, Income, sales comparison, or manual). Model selection would be at the building level which would allow different models to be used on the same parcel (parcel with 3 building could have one building valued on cost, one on the sales comparison approach and one on income).
- Ability to enter a manual assessment value.
- Ability to enter a trend value or manual % adjustment to the current building value; or place a 0 value on a building or structure.
- Ability to have building segments related to the sketch.
- Allow building segments to have exterior code, cost adjustments, architectural adjustments, and % complete information.

- Require comments when cost adjustment, architectural adjustment, economic obsolescence, functional obsolescence and land segment adjustments are applied.
- Ability to select a given model for valuation of mobile homes (Marshall Swift Cost, NADA values, Income, sales comparison, or manual). Model selection would be at the building level which would allow different models to be used on the same parcel.
- Interface with mobile home registration file in order to enter all needed information for appraisal process of said mobile home, i.e. sketch, year, ownership data.
- Ability to store multiple classifications for each parcel.
- Ability to designate a primary mailing address as well as a primary situs address.

Building Sketch

- Ability to view and maintain sketches and attributes associated to each building.
- Completed sketch will return the square footage, story/improvement code and calculated area for calculation of the cost value.
- Segments/Polygons can be drawn using mouse, stylus, voice or keyboard.
- Ability to draw angles and arcs (curves).
- Ability to make perimeter drawings using: diagonals, angles, arcs (curves) and radials.
- Ability to label segments/polygons using keyboard or select labels from drop down with mouse.
- Length of lines are displayed and can be moved if so desired.
- Ability to move segments/polygons.
- Ability to edit segments/polygons.
- Ability to edit without having to start sketch over.
- Ability to add an attachment to an existing sketch as a standalone in order to put in characteristics for that new attachment.
- Ability to copy/cut and paste segments/polygons
- Ability to convert current sketch data. The converted data will have to match the square footage, story/improvement codes and adjustments from the original data within a small, acceptable range.
- Application would calculate area of segments/polygons in square feet or meters.
- Ability to draw free form lines.
- Application should allow a default scale to be set.
- Display line length while sketch is being drawn.
- Auto close feature.
- Ability to create segment/polygon in a continuous manner, i.e. start, anchor corner and continue.
- Ability to measure lines on existing segments/polygons in order to attach additional segments/polygons, i.e. garage is 4 feet from the corner of the house.
- Ability to generate a DXF shape "image" of sketch. This could be exported and used as the building footprint in GIS.
- Ability to maintain current year plus nine year history of sketches.
- Retrievable by: PIN, route map number, deed or contract name, street number and name, DBA (doing business as)
- Can display and store dimensions, automatic area calculations, link to data entry fields and notes.
- Multiple sketch screen capability
- Available on remote laptops

Commercial

- Unlimited building sections.

- Ability to view a list (summary) of all commercial building on a parcel (year built, building use, building name, model, value and building sequence).
- Ability to display building details.
- Ability to add new buildings and delete, transfer, or edit existing buildings.
- Ability to add building information for valuation of partially complete structures using a percentage.
- Ability to value building on a cost approach.
- Ability to generate a Marshall/Swift cost estimate and Cost Summary report.
- Ability to add, edit or delete Marshall Swift profile.
- Ability to add, edit or delete an income approach.
- Ability to value building income approach using the direct capitalization rate method for various types of commercial properties (apartment, hotel/motel, mini warehouse, Mobile Home Park, office building, office warehouse, retail, shopping center, shopping mall, and warehouse).
- Ability to value a building on income approach using discounted cash flow method.
- Ability to add, edit or delete a sales comparison approach.
- Ability to select a given model for valuation of the building (Marshall Swift Cost, Income, sales comparison, or manual). Model selection would be at the building level which would allow different models to be used on the same parcel (parcel with 3 building could have one building valued on cost, one on the sales comparison approach and one on income)
- Ability to associate a building to land segments on the parcel where the building resides and/or to land segments on other parcels to calculate the income approach to value
- Ability to enter and maintain survey data.
- Ability to display years of survey data.
- Ability to produce survey questionnaire and cover letter for mass mailings.

Detached Improvements

- Ability to view and maintain unlimited detached improvements.
- Ability to apply depreciation from the main building to detached improvements.
- Ability to view and maintain comment information.
- Ability to associate a picture to detached improvement.

Pricing building and yard extra from user definable tables

- Residential tables
- Commercial tables
- Agricultural tables
- Combination of pricing methods
- Residential Comparable Search procedures and reporting

Valuing calculation

- Certified pricing tables
- Working pricing tables
- User editable tables
- Table security with passwords
- Ability to provide for the calculation of values in multiple years. The certified values must be on-line calculations as well as have a working database for the next year's work. In addition, table security must be provided
- Ability to have Farm Land and Farm Buildings on their own line in the posting of final values.

Sales Ratio

- Ability to have sales ratio statistical analysis capabilities integrated within the system and without exporting sales data to third party software.
- Conforms to Illinois Department of Revenue Regulations according to the Illinois Code of Laws and Iroquois County's Regulations and Ordinances.
- Land analysis by: vacant lot, land residual and land ratio.
- Available on remote laptop computers.

Batch processing

- Mass revaluation by main tables
- Mass revaluation by test tables
- Mass revaluation on Certified Files
- Mass revaluation on Working Files
- Audit log for value changes

Assessment History

- Ability to display a summary view of the assessment history on a given parcel.
- Ability to select the details for a given assessment history and display the associated parcel details.

Owner History

- Unlimited owners and addresses per parcel.
- Ability to view and maintain ownership changes to a parcel.

Parcel Interfaces

- Ability to display current and historical owner address information.
- Ability to talk to existing Tax System, i.e. in regards to when an equalization factor is applied it will be added to and reflected in the cama system values as well.
- Ability to view a GIS map from the parcel details.
- Ability to send a list of parcels or workgroup to view on a GIS map.
- Ability to select a parcel or lasso a set of parcels from a GIS map to create a workgroup.
- Ability to link GIS with CAMA to mass update an aggregation of parcels in either order.

Parcel Links

- Ability to export/import data using excel.
- Ability to link to sales listings, photographs, laser fiche, etc. (excel, PDF, websites, resources).
- Ability to display subdivision plat or parcel surveys where appropriate.

Land Use Maintenance

- Ability to query parcels within land use by selected criteria (i.e., tax id, land use year, class and type).
- Changes made to land use records would need to be approved by supervisor.
- Ability to view and maintain land use data for current and history records.
- Ability to limit update access to land use date and remarks.
- Ability to view and link scanned documents.
- Ability to value ineligible acreage to calculate total land use value.
- Ability to tract land use parcels for current year plus five years from the inactive date.
- Ability to accept scanned documents and automatically attach to parcels.

Parcel Abstract Processes

- Ability to manually access legal papers, deeds and subdivision plats, from the Recorder of Deeds website and maintain a record of entry into the CAMA application.

New Parcels

- Ability to create a work item which will contain necessary information to be sent the Assessor's Office for the creation of new parcels using GIS.
- Ability to accept work item from the Geographic Information Systems Technology for processing of new parcels.
- Ability to create parcels in GIS that automatically create parcel info in CAMA.
- Ability to preview a list of new parcels from the GIS interface before committing to the db.
- Ability to apply mass changes and individual changes to new parcels.
- Ability to set a "creation code" and description on new parcels, i.e. county initiated, owner initiated, owner initiated family.
- Ability to send "New Parcel" work item to appropriate appraiser for valuation.
- Ability to calculate Rollback Taxes.

Transfers

- Ability to transfer a given parcel to a new owner account and maintain an owner history record.
- Ability to search and select a current owner to assign to a given parcel.
- Ability to display ownership in query results listing.
- Ability to add sales to existing entities by selecting applicable parcels.
- Ability to designate ownership percentage as optional when completing a sale.
- Ability to have unlimited owners on a given parcel.
- Ability to edit sales information after the transaction has been saved.
- Display median sale to assessment ratio by subdivision, neighborhood, commercial use code and work area.
- Ability to identify a transaction as foreclosure.

Base Parcel Tracking

- Ability to receive the parent parcel information from the parcel creation process from GIS.
- Ability to keep track of the parents and children of each individual parcel when parcels are split or combined.
- Ability to select a parent or child parcel to open corresponding parcel details.

Appraiser Worksheets

- Ability to print appraiser worksheets by tax id, subdivision, neighborhood, building use code, work area and address range for an individual parcel or group of parcels.
- Provide the ability to process appraiser worksheets in sets from a group of parcels and keep track of ones that have been printed.
- Provide the ability to view and update worksheets electronically.

Building Permits Tracking

- Unlimited building sections.
- Ability to receive newly issued and voided building permit information daily through an interface. (i.e., additions, HVAC, new construction).
- Ability to maintain building permit information within a table in CAMA.
- Ability to identify all existing active building permits within a given workgroup to perform a field inspection (cycle permits).

- Ability to identify all existing active New Construction permits for purpose of valuing “Partials”. The supervisor would have the ability to assign these using workflow.
- Ability to query permits and display status (i.e., complete, voided, assigned for pickup etc).
- Ability to query permits by permit number, tax id and property address.
- Ability to provide a secure means to manually update permit log.
- Ability to distribute permits via workflow to township assessors/appraisal specialists to be worked.
- Ability for supervisor to query permits based on the area of assignment and view status.
- Ability to view and print a building permit.
- Ability for GIS interface so active permits can be seen on an active parcel layer.

Final Inspections Tracking

- Ability to receive final inspection and Building Inspection data entry error corrections through an interface to create workflow items and update permit log.
- Ability to print building permit and worksheet if so desired to process final inspection work item.
- Ability to view and report all final inspections and their status.
- Ability to have a summary view of outstanding final inspections with assignments and status, filtered by permit type and supervisor.
- Ability to assign or reassign work for final field inspections from the summary view.
- Ability to forward the workflow item to data entry for a parcel update and sketch.
- Ability for data entry to flag records for review when Pictometry may be implemented.

Sales Review

- Display sale to assessment ratio at time of sale as well as in a query result listing.
- Display median sale to assessment ratio by subdivision, neighborhood, commercial use code and work area.
- Ability to print an appraiser worksheet.
- Ability to set parameters on sale to assessment ratio which triggers field inspection.
- Ability to forward work item back to abstract for any identified corrections with comments.

Supplements/Adjustments

- Ability to process changes to the current assessment as well as five previous years.
- An effective date for the value change will be entered along with a “change reason code”.
- Ability to correct the assessment history for all changes for all years affected.
- Ability to view the differences between previous current and new current values for the value to be supplemented.

Parcel Revaluation Processes

- Ability to generate subdivision lists based on assigned work area. List would be similar to the one currently used that lists the subdivision, number of parcels and sales in each subdivision and the median sale to assessment ratio.
- Ability to generate subdivision lists to indicate revaluation status (Complete/Not Complete).

- Ability to generate list of parcels by certain attributes including subdivision, work area, neighborhood number, use code, etc. to show revaluation status (Complete/Not Complete).
- Ability to review one parcel or more to see if the assessment is correct for the coming year.
- Ability to apply individual changes or mass changes where necessary.
- Ability to view and print building permits for purpose of cycling permits during revaluation.
- Ability to generate a work item for supervisor approval.
- Once approved, revaluation flag is set for the parcel.

Analysis

- Ability to view an individual record or a list of records for comparison of projected values and current values.
- Ability to have a comparison view of all the possible valuation approaches on a given parcel.
- Ability to access parcel details from parcel summary comparison view.
- Ability to select comparable area based on distance.

Integrated Digital Photographs

- Ability to have integrated digital photographs with access to the photographs while viewing a parcel
- Digital photos
- Multiple photos per parcel
- Free form photo descriptions
- Adjustable image quality
- Capability to print on Property Record Cards and other reports
- Can be entered via camera disk, download or scanning

Web Interface

- CAMA data and comparable data can be viewed via Web interface.
- Ability to accept documents electronically and generate a workflow to a predetermined user.
- Ability to scan documents into individual records and view those documents.
- Ability to access and download/upload information onto the Web interface.

Statistical Reports

- Ability to filter sales based on a date range, work area, story type, quality, square footage, or neighborhood.
- Ability to display the necessary information for revaluation analysis and approval (mean, median COD, etc.). Note: ACCESS or another tool will still be available for queries.
- Ability to display statistical analysis for a given workgroup for both current and projected values.
- Ability to create and print statistical reports for analysis including Estimate Review and Sales Summary Report.

Parcel Workgroup Processes

Maintenance

- Ability to create and maintain records in workgroups.
- Ability to display summary parcel information with associated details to eliminate multiple records for a given parcel in the workgroup list.
- Ability to update individual record or apply mass change to a group of records.

- Ability to refresh or clear a workgroup and append or remove parcels from the group.
- Ability to maintain separate workgroups by appraiser.
- Ability for supervisors to view and approve appraiser workgroups.
- Ability to export or import workgroup data to excel.

Mass Change

- Ability to filter workgroup base parcel data by subdivision, neighborhoods, county code, state codes, land values, etc. by both GIS and CAMA.
- Ability to perform mass changes based on specified criteria for either residential or commercial properties (i.e., model selection, cost year (MS), depreciation, market adjustment, neighborhood number.)
- Ability to mass change data using GIS.
- Ability to apply depreciation on first main building to miscellaneous improvements.
- Ability to view changes applied to a workgroup.

Reports

- Ability to create a file of assessment to sale information for reporting to the State on an annual basis. (Sales ratio study).
- Provide a report for assessment information to be used for validation of the land book.
- Provide a weekly report by appraiser.
- Ability for a CAMA user to create ad hoc reports.
- Provide system reports using supplemental changes reason codes. (new construction, additions, fires, demo)
- Provide reports for current and projected assessments.
- Provide audit reports showing changes in value by reason codes. This report would summarize changes in current value as well as projected value by “change” reason code.
- Reports could be generated on demand.
- Ability to create a Board of Equalization package for a given set of parcels.
- Ability to provide exonerations/refunds report for approval by Assessor and transmittal to Treasurer.
- Ability to provide a rehabilitation credit report to be processed by the Treasurer.
- Ability to spell check all documents.

Robust Reporting Capabilities

- Robust “What if” tools
- SQL compliant query procedures
- Multiple sorting levels
- Multiple filters
- Sales report
- General parcel lists
- Property Record Card
- Parcel Summary Report
- Occupancy Report
- Building Permit List
- Add & Edit Logs
- User defined report generator
- Export of data to Microsoft Excel file format for spreadsheet formats
- URAR-style report including photographs
 - Reports to include but not limited to:
 - Perform sales ratio analysis reports

- Perform sales comparison approach
- Perform local cost approach analysis reports
- Perform mass appraisals
- Perform appraisal based on income
- Reports by memo code
- Reports to show % of value changes
- Reports to show overrides in value
- Reports for BOR changes
- Reports for PTAB changes
- Parcel lists by neighborhoods
- Reports to be able to compare like properties

System Data Access

- Take full advantage of latest MS.NET framework 4.8 or above.
- Ability for system to allow for mobile data entry from field, such as drawing buildings or updating property characteristics that can be uploaded into main system upon completion of field work or real-time via wireless technology.

Documentation/Help

- Ability to create and maintain system documentation.
- Ability to create and maintain system help.

Data Purge

- Ability to allow authorized users to specify when data is purged.

Workflow Processes

- Ability to assign multiple parcels and tasks to a person in one step.
- Ability to create and manage workflow items including task, assignment, status, approval, and routing integrated with the application (i.e., not external emails).
- Ability to configure workflow business logic steps.
- Ability to maintain a history of workflow items by category type.
- Ability to query workflow items by selected criteria (ex. Person, type, assignments, etc.)
- Workflow notification. i.e. when assigned and completed.

User Interface

Multi year

- Data that doesn't change is not duplicated (copied over) year to year for multi-year data management.
- Start future year's work at any time for multi-year data management.
- Changes are automatically migrated to future years.
- If multiple records are returned from an inquiry to the database, a list should display with summary information.
- If only one record is found from an inquiry, the individual detailed record should be displayed automatically.
- Ability to select a detailed record as a result of clicking on one of the list items in the search results.
- Ability to open records to inquire by default with an option to open to edit for maintenance.
- Ability to navigate through a list of records within the main details view.
- Ability to have short cut keys to activate certain features to minimize the use of the mouse.
- Ability to distinguish between required entry fields and those that are read-only.

Error Handling

- Provide consistent and meaningful validation, error handling and messaging.
- Provide appropriate error handling, logging, and notification processes.
- Ability to research system logs for error and problem resolution.
- Ability to elevate a system problem for notification to development staff.
- Ability to send notification of application status, downtime, or maintenance to all users.

GIS

- Ability to create and review predictive statistical models (including regression analysis & comparable sales analysis) within a GIS environment.
- Ability to seamlessly integrate statistical models of property analysis within a GIS for the purposes of value review, data visualization and spatial query analysis.
- Ability to use a variety of visual classifications including Quantiles, Graduated Symbols, Ratio Maps, and Value Maps to symbolize qualitative or quantitative data.
- Ability to tag properties with spatial data.
- Ability to spatially select and summarize data using user-defined polygon boundaries.
- Ability to query, display and filter the property information in a map interface.
- The system shall have the ability to vary comparable selection criteria based on geographic proximity and similarity of attributes and include as multiple sequential iterations within a single statistical model.
- Offer the ability to review the regression and Sales Ratio results spatially.
- Ability to view the comparable sales ratio analysis on a map.
- Ability to generate a comparable sales model for market valuation.
- Ability to view a number of comparable sales spatially.
- Ability to distinguish between required entry fields and those that are read-only.
- The system shall have the ability to tag and record which comparables and which iteration were used for each subject property and review the subject and the comparables used on a map.
- Ability to review property information for both the subject and the comparables within a mapping environment.
- Ability to stand alone or interface with Damage Assessment Software.

Training

- Sufficient training should be provided to the assessor's staff and to the township assessors to allow easy operation of the CAMA system. In addition, support should be provided after the installation and training.
- On-site training
- On-line Help within the CAMA system
- Unlimited telephone support for CAMA software
- Assistance in fine-tuning tables to local market conditions
- User group meetings
- Workshops and seminars
- Newsletter export result sets to a minimum of Microsoft Excel file format.

6.0 Technology Architecture:

Technology Architecture

Server OS:

Microsoft Windows Server 2022

Desktop OS:	Microsoft Windows 10 or 11
PC's:	Primarily Dell Computers/Laptops
Databases:	Microsoft SQL Server 2022 Standard
Printers:	HP LaserJet and XEROX copiers

6.1 Server and PC Requirements:

The client or remote portion of the software must run on personal computers with Windows 10/11 Operating Systems. The minimum PC requirements for normal operation of the client for the next three years must be itemized. These requirements must include minimums for CPU and clock speed, CPU caching, main RAM, Video resolution, screen size, video graphics accelerator RAM, MMX or other Multimedia requirements, CD ROM speed, hard disk space or any other special needs of the proposed software. Solutions with less stringent client requirements are preferred. Diagrams should be included if special network requirements are part of the proposal. The software is required to run on Tablet PC's and or IPAD's as well for field personnel.

Iroquois County will accept any equipment, operating systems, databases, communications methods, or programming languages that meet the standards outlined above. Preference will be given to those proposed systems that operate on X86 64-bit Windows Server 2022 STD and Microsoft SQL 2022 STD environment in Virtual (VM) environment. The Proposer shall provide the minimum specifications for server(s) required for the solution. We reserve the right to purchase, under a separate bid, all hardware necessary to implement this solution. The System should also integrate with Lightweight Directory Access Protocol (LDAP), and allow for the monitoring and reporting of database activity.

6.2 Network Security:

Standards and requirements exist to ensure security and availability of the data and systems. County's network connects to the Internet through a firewall. Must be compatible with Iroquois County's 3rd party IT Department, Area-wide technologies.

6.3 Application Security:

County proposes to follow three-tiered structure for web-enabled systems that are accessible from the Internet. These systems will host their web pages on a web server while the application and databases will reside on different server(s). This configuration promotes maintainability and is desired on all new systems being evaluated for the County.

In addition, all web servers should have their systems configured to disable all non-essential functionalities (SMTP, SNMP, FTP). County has a process to update all servers with the latest security patches to enhance security. The application vendors should adhere to the industry practice of compliance to the latest version of system software levels to ensure maximum security to information and services provided by the County.

7.0 **Scope of Work:**

1 The successful Offeror shall provide all software, programming, documentation, training materials, personnel, technical knowledge, and project management skills necessary to implement a computer assisted mass appraisal solution as outlined in the Request for Proposals. The proposed solution should run on a MS SQL database natively, and accommodate a minimum of 30 concurrent users. The Successful Offeror shall identify minimum specifications for

computers, servers, desktop or network printers, or other equipment requirements necessary to operate the system in their response to the RFP. The County will ensure equipment installed meets or exceeds the minimum specifications and available for use in accordance with timelines identified in the project plan. The Successful Offeror will provide a schedule of equipment required for the successful implementation of the CAMA solution and the minimum specifications of the listed equipment.

2 The Successful Offeror will develop and submit a Project Implementation Plan as part of the contract document. The project plan shall include, but not be limited to, strategies for the installation and implementation of the System. The project plan shall address the tasks necessary for the successful installation and setup of the database, software required to run the application, including interfaces, data conversion and a change management strategy including communication and end-user training. The project plan will indicate the resources required from the County for the successful implementation of the project. The Successful Offeror's Project Manager shall maintain a detailed project plan and schedule in a format mutually agreed upon. This project plan shall include a detailed list of tasks for the project and the personnel assigned to each task. The Successful Offeror shall provide to the County's Project Manager an updated project schedule weekly.

3 The Successful Offeror will provide staffing levels and resources to ensure successful completion of the Project Plan within the project timeline and budget. The Successful Offeror must provide a project team composed of the best-qualified staff for this project. Team members assigned to the Iroquois County project must have experience in public sector implementations, and should be assigned to the project on a full-time basis until the County has accepted the CAMA solution.

The Successful Offeror will provide project management on a continuous basis by assigning a full-time project manager who will work on-site as needed and exclusively on the Iroquois County CAMA system project. The Successful Offeror's Project Manager will work jointly with the County's Project Manager(s) to manage the project and execute the project plan. The Successful Offeror shall not remove and/or change key team members or their roles without the written consent of the County's Project Manager. Iroquois County shall have the right to remove Successful Offeror's staff if the County determines that the individual does not exhibit the skills, experience, and/or motivation to execute the solution as outlined in this RFP and the resulting contract. The Successful Offeror must complete and provide a current resume for each proposed staff member.

4 The Successful Offeror shall develop and submit a comprehensive training plan and strategy suitable for training County staff to operate the new system and provide ongoing support and maintenance. We anticipate training approximately 12 CAMA end users. Training must include end user training, functional/system administration training to be handled by the Assessor's Office and database/technical administration training to be handled by the Information Technology Department.

5 The Successful Offeror will ensure that one (1) hard copy and three (3) electronic copies of user documentation is provided to County staff for the operation and support of the system. The Successful Offeror shall provide two complete sets for both CAMA technical manuals and user manuals to Iroquois County for administrator and end-user training. Additionally, the Offeror shall provide one electronic copy (Microsoft Word) of the technical and user manuals to Iroquois County. The successful vendor shall provide Iroquois County with an Entity Relationship Diagram (ERD), a Data Dictionary (DD) or other mutually agreeable documentation defining the relationships of tables within proposed application's database. This documentation will be used with, but not limited to, software utilized by the county's Finance Department for purposes of Internal Audit. The County, at their expense, will have the right to make additional copies of the documents as needed. The Successful Offeror will also provide the County with complete system

implementation documentation concerning installation, configuration, testing, interfaces, data conversion, and integration of the System.

6 The Successful Offeror will be responsible for identifying, designing, coding, and implementing all system interface, data conversion, and integration solutions necessary for a successful project implementation. The proposal must provide a discussion regarding the Successful Offeror's approach to data conversion and interface development and for testing of both, as it relates to this project. The discussion should address the method of conversion, strategies for testing, verification, validation, contingencies, and security. The Successful Offeror will be responsible for developing permanent interfaces and crosswalks to/from the County's existing systems into the proposed application.

7 The Successful Offeror shall provide a detailed testing strategy as part of their contract to include thorough testing of all transactions and processes used by the County. The test strategy shall include, but not limited to, unit testing of individual detailed transactions using account information, parallel testing and system testing all processes, interfaces, and conversions. The test strategy should also include methods for verifying the accuracy of information relative to transaction processing, interfaces, data conversion, reports, account history, notes, and ad-hoc reporting. Iroquois County will require the successful proposer to implement a test environment for training purpose or any future IT requirements.

8 The Successful Offeror's solutions must provide a series of reports and edits to facilitate the County's reporting needs, and the verification, validation, reliability, editing, correction and audit of system information and data.

9 Technical and maintenance support shall be provided through an annual maintenance agreement between the Successful Offeror and Iroquois County. The Successful Offeror must include a sample of their annual maintenance agreement in the proposal and provide guaranteed annual pricing for 5 years. The first twelve (12) months of maintenance must be included in the initial purchase price of the software and will not commence until the CAMA applications have been placed in production and accepted by the County. The maintenance agreement must provide ongoing system support and maintenance, including upgrades, bug fixes and patches, and other technical support necessary for County staff to operate the system. The Successful Offeror must provide information on the frequency of software updates and new software releases (i.e. bug fixes and major revision levels) for the system and the anticipated life cycle of the software being proposed.

10 Successful Offeror will be required to prepare a written disposition addressing each requirement that requires customization. The response must include a description of how the customization requirement will be met, impact of the change on the base software (i.e., including on the change in future general releases), impact of the change on future maintenance releases, a mechanism for isolating and identifying and County-specific modifications in order to facilitate re-application of the modifications in the future, program specifications and a test plan that can be used to validate successful implementation of the customization task.

Upon completion of the customization review, the County may, at its sole discretion, choose not to implement some of the modifications proposed in the fixed price solution. The County expects a credit for these hours that may be used for new requirements as the project progresses.

8.0 Implementation & Questions: Please complete the following questionnaire, and submit it along with your response to the RFP:

1. Please describe your overall project plan with critical points and proposed overall timeline.
2. Describe Iroquois County's responsibilities and required resources in support of system implementation and the implementation process to include: Consider offering information pertaining to the number of County's subject matter experts that will be working on the project and the percentage of time available to the project.
3. Explain your testing phases.
4. Provide details of Iroquois County's participation in developing test files.
5. Specify any parallel testing requirements and the number of acceptance testing rounds. Plus, the type of defects and their definition (i.e. Critical, Normal, Cosmetic, etc.)
6. Specify the acceptance criteria for the system to go into production – Offer Use Cases, test plan, and include performance requirements.
7. Describe the process or how you will help Iroquois County when we decide to upgrade the Operating system/Database/third party software which might impact the proposed software?
8. Describe the proposed on-site team and their experience implementing your application.
9. Can your CAMA system support the extending of value on Agricultural land by the Illinois soil grades? Yes_____ No_____
10. Can your CAMA system support multiple land, building, addition, yard extra, sketch and photos per parcel? Yes_____ No_____
11. Can your CAMA system export all data fields, sketches and digital photographs to be integrated with GIS software? Yes_____ No_____
12. Can your CAMA system print land records, buildings, additions, yard extras, all sketches and all photographs in Property Record Card format? Yes_____ No_____
13. Can your CAMA system do statistical sales analysis from within the CAMA software without exporting to third party software? Yes_____ No_____
14. Do you have unlimited free telephone consultation for use of your CAMA system?
Yes_____ No_____
15. How many parcels do you value with your CAMA system per year?
16. Explain the most important feature your CAMA system has for the assessor's use.
17. Software add-ons or additional products. Please list costs, details, and benefits.

9.0 Proposal Evaluation

Sealed bids must arrive to Iroquois County Clerks Office at 1001 E Grant St, Room 104, Watseka, IL 60970 no later than 4:00 pm CST on November 27, 2023. Sealed bids shall be enclosed in an envelope marked "Iroquois County CAMA Bid". Failure to follow bid time frame and specifications may void your bid. All bids are final.

- A. The following information must be tabbed to identify the required information. Failure to submit this information will render your Proposal non-responsive.

1. Technical Approach: Provide a description of the Proposer's approach to the project, to include startup procedures/requirements, methodology, operations and management of billing/invoices reporting procedures to the County. Provide a copy of Proposer's schedule of services. Provide information on the managing of data collected during the contract and the systems and reporting capabilities.
 2. Qualifications of the Firm: Provide a description and history of the firm along with information related to previous experience of providing services similar in nature, size and scope to those outlined in section 7.0 of this document. Provide at least three (3) references for which the firm has performed services within the past five years that are similar to the requirements in the Scope of Services outlined in section 7.0 of this document.
 3. Qualifications of Staff: Provide an organization chart, resumes, and summary of staff qualifications; along with key project staff pertaining to the contract. Key staff's experience demonstration current capacity and current expertise in the scope of the work outlined in section 7.0 of this document. Provide education, certifications, or special training of key staff members who would be assigned to the contract.
 4. Cost Proposal: Each Proposer must complete and submit the Cost Proposal. The Cost Proposal will be evaluated on the rates that will be billed to the County with any addition of overhead, administrative cost or price increases applied over a 5-year term.
 5. Functional Requirements: Extent to which the proposed interface, integration, hardware, annual support, data conversion, and software solutions satisfy the RFP's functional requirements. Compliance with the RFP's technical requirements Extent of modifications required to meet requirements. Noncompliance with significant instructions may be grounds for RFP disqualification.
- B. Information must be received at the Iroquois County Clerks Office, located at 1001 E. Grant St, Room 104, Watseka, IL 60970. Faxed information is not acceptable. Proposals received after specified time and date will be rejected as non-responsive.
 - C. The Offerors will be evaluated by a committee comprised of county officials and key personnel with experience and knowledge of services and contracts of this scope and nature.
 - D. The Offerors past performance, personnel experience/project team, experience in the services outlined in section 7.0 in addition to the merits of the Proposal and costs are the general Evaluation Criteria. These criteria are clarified in more detail in Section 10.0.
 - E. Iroquois County reserves the right to reject any and all Proposals at any time prior to award; and to waive informalities and minor irregularities, and request additional information or clarifications in the evaluation of responses received. Iroquois County shall select the offer that best serves the interest of Iroquois County; Offerors are advised to provide all pertinent information required by the Proposal in their written response.

10.0 Evaluation Criteria

Suitability: The suitability of the Offeror's proposed services to meet Iroquois County's requirements and needs – 25%

Organizational Qualifications: Offeror's experience in providing services as requested in the specifications outlined in section 7.0 of this document – 25%

Key Personnel: Individuals representing Offeror's organization who will be assigned to the contract along with credentials and roles of those individuals – 20%

Price and Cost Containment: Offeror's pricing strategy and Proposal for containment of future costs and financing arrangements – 10%

Functional Requirements: Offeror's ability to service the county efficiently based on proximity of workforce to service location(s) in Iroquois County – 20%

10.1 Proposal Preparation

A. All Proposals should be complete and carefully worded and must convey ALL information requested by Iroquois County. If errors are found in the Offeror's Proposal, or if the Proposal fails to conform to the requirements of this solicitation, Iroquois County will be the sole judge as to whether that variance is significant enough to reject the Offer.

B. Proposal should be prepared simply and economically. All data, materials and documentation shall be available in a clear, concise form. If additional information is required, Offerors shall supply additional materials as needed for the evaluating committee's internal use. Iroquois County reserves the right to reproduce Proposals for internal use in the evaluation process.

C. All Proposals shall provide a straight-forward, concise description of Offeror's ability to satisfy the requirements of this Solicitation.

D. The copy of the Proposal should be BOUND in a single volume. All documentation submitted with the Proposal should be bound in that single volume and not stapled, paper clipped or other similar means.

E. If Proposal includes any documents or comment(s) over and above the specific information requested in this Solicitation, such material must be included as an appendix to the Offer.

F. Proposal must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting an Offer.

IROQUOIS COUNTY HAS THE RIGHT TO REJECT ANY OR ALL PROPOSALS AT OUR SOLE DESCRETION.

11.0 REQUIRED SIGNATURE PAGE – VENDOR PROPOSAL

IN WITNESS WHEREOF, the undersigned have caused their duly authorized officers to submit this Request for Proposal, all as of the _____ day of _____, 20____

Company: _____

Signature: _____

Title: _____

12.0 Mandatory References

Name a minimum of five references where the specific system software application you propose is installed and currently running. Although only two references are required, you are encouraged to give additional references.

Application References

Reference 1: (Mandatory requirement)

Name: _____
Address: _____
Contact: _____
Phone: _____
No. of parcels in jurisdiction: _____
Hardware platform: _____
Date of Acquisition: _____

Reference 2: (Mandatory requirement)

Name: _____
Address: _____
Contact: _____
Phone: _____
No. of parcels in jurisdiction: _____
Hardware platform: _____
Date of Acquisition: _____

Reference 3: (Mandatory requirement)

Name: _____
Address: _____
Contact: _____
Phone: _____
No. of parcels in jurisdiction: _____
Hardware platform: _____
Date of Acquisition: _____

Reference 4: (Mandatory requirement)

Name: _____
Address: _____
Contact: _____
Phone: _____
No. of parcels in jurisdiction: _____
Hardware platform: _____
Date of Acquisition: _____

Reference 5: (Mandatory requirement)

Name: _____
Address: _____
Contact: _____
Phone: _____
No. of parcels in jurisdiction: _____
Hardware platform: _____
Date of Acquisition: _____