City of Portsmouth
Portsmouth, New Hampshire
Assessing Department
RFP #42-08

"CAMA SYSTEM CONVERSION"

REQUEST FOR PROPOSAL

Sealed Request for proposals, **plainly marked, RFP# - 42-08 CAMA SYSTEM CONVERSION on the outside of the mailing envelope as well as the sealed non-price and price proposal envelopes addressed to the** Finance/Purchasing Department, City Hall, 1 Junkins Avenue, Portsmouth, New Hampshire, 03801, will be accepted until 2:00 p.m, February 15, 2008.

The City of Portsmouth, New Hampshire seeks specific qualifications from interested vendors that are capable of installing a Computer Assisted Mass Appraisal (CAMA) system as well as converting data to the new system from the City's current CLT Univers CAMA system for 2008.

This Request for Proposal may be obtained by visiting or calling the Finance/ Purchasing Department on the third floor of City Hall, One Junkins Ave, Portsmouth, NH, and (603) 610-7227 or by downloading it from the City's web site at www.cityofportsmouth.com. **Continue below for the complete document..**

Questions regarding this proposal should be directed to Rosann Maurice, City Assessor (603) 610-7212 or Lori MacGinnis, Purchasing Coordinator at (603) 610-7227.

The City of Portsmouth reserves the right *to reject any* or all Request for Proposals, to waive technical or legal deficiencies, and to accept any RFP that it may deem to be in the best interest of the City.

REQUEST FOR PROPOSAL

PURPOSE
The City of Portsmouth, New Hampshire seeks specific qualifications from interested vendors that are capable of installing a Computer Assisted Mass Appraisal (CAMA) system as well as converting data to the new system from the City's current CLT Univers CAMA system for 2008. Of specific interest to the CITY is the COMPANY'S experience in converting existing appraisal database information and installing computerized appraisal and administration systems for use by CITY personnel. The computerized system shall have been market tested and successfully implemented for at least five (5) years prior to the submission of the COMPANYS' proposal. It shall include a Digital Imagery system that is fully integrated with appraisal software. The COMPANY shall include at least 3 references that reflect a system conversion, computerized appraisal installation, digital imagery implementation, and fully functional, integrated mobile data base for municipalities of a similar or larger size than Portsmouth. Each prospect must submit a two-part proposal, each being in its own sealed envelope, consisting of a "Price Proposal" and a "Non-Price Proposal". Proposals will be received at the office of the Purchasing Agent, 1 Junkins Avenue, Portsmouth NH 03801until 2:00 p.m., Friday February, 15, 2008.

II.   BACKGROUND
As of April 1, 2007, the City has approximately 8,700 parcels. The Assessing staff consists of (3) full time assessing positions and (1) full time permanent assessing clerk.

III.   DESCRIPTION OF THE VENDOR PROCUREMENT PROCESS. The process for Vendor procurement will proceed in two stages. The first stage is "Submission of Written Qualifications" with the second being an interview and software demonstration. The vendor shall submit five (5) copies each of the "Price Proposal" and the "Non-Price Proposal".

IV.   VENDOR PROCUREMENT PROCESS

A. PROJECT AWARD

The City of Portsmouth reserves the right to reject any, or any part of, or all proposals; to waive informalities and technicalities; and to accept that proposal which the CITY deems to be in the best interest of the CITY. The City reserves the right to undertake such investigating of the Company as it deems necessary to evaluate the Company's qualifications. The Company may be asked to execute releases to facilitate reference checks. Failure to execute a release if requested may result in disqualification.

Consideration in the awarding of the Contract will be given to experience and competence of the COMPANY'S, quality and experience of the COMPANY'S personnel, the nature and size of the COMPANY'S organization, the quality of similar projects performed by the company in the past, the quality and efficiency of the CAMA software package, it's ease of use, administration and adaptability of the computer

software, the COMPANY'S' performance and experience in converting existing CAMA database to new CAMA system. After any interviews have been conducted, the City shall rank the respondents and select the respondent that has made the best proposal, open the price proposal, and invite the successful respondent to negotiate a contract with the City. Included in the contract requirements is the need for insurance.

B. SUBMISSION REQUIREMENTS

Each proposal shall consist of the following:

1. Cover letter with contact information.

2. Proof of Certification
   Each company, corporation, partnership, or individual must hold from the time of submission of the proposal through the completion of all work hereinafter required, written certification of approval by the Department of Revenue Administration pursuant to Part 600, Administrative Rules.

3. Description of the firms qualifications
   The Proposal shall include a statement showing the number of years actually engaged as a company, corporation, partnership, or individual specializing in governmental tax revaluation services. Each proposal submitted shall identify the COMPANYS qualifications and experience.

4. The Company shall submit a complete client list of municipalities to which it has rendered services during the last (5) years. At least (3) such projects shall have been performed for a municipality whose assessment list is comparable or larger than the City of Portsmouth.

5. The COMPANY shall submit to the CITY written qualifications of all personnel assigned to this project in the form of a resume. All personnel assigned to this project shall be subject to the approval of the CITY ASSESSOR'S OFFICE and shall be removed from this project by the COMPANY upon written recommendation of the CITY.

6. Proposed schedule.

7. Identification of hardware:

   - Workstation specifications including processor speed and RAM minimum
   - Hard Drive
   - Operating system (Windows XP, etc.)
   - CD Rom
   - Anti Virus software
   - Monitors
   - Network Cards
   - Modem

- Tape drive
- Laser printer

8. Description of system requirements.

III. SCOPE OF WORK

A. GENERAL REQUIREMENTS

1. The conversion project consists of the conversion of an existing CAMA system database and installation of a new Windows based system.

2. The COMPANY that executes the contract with the CITY shall perform all work for the project in accordance with these specifications described herein.

3. The project shall be subject to the direct supervision and approval of the City Assessor of the City of Portsmouth.

4. The CAMA system shall include valuation capability for all residential, commercial, industrial, condominiums, vacant land and exempt properties. The system also will employ computerized sketching capability based on vectors

5. The CAMA system shall have the ability to develop and select more than one approach to value including but not limited to the cost approach, the income approach and the direct sales comparison approach, multiple regression method, weighted estimate comparable sales technique etc. The system shall be capable of generating complete and final property values for each parcel by the cost approach, direct sales comparison approach and income approach for commercial and industrial properties.

6. The CAMA system shall be capable of generating statistical reports and assessment administration studies as follows:

   - Statistical analysis by market stratification, ratio studies and coefficients of dispersion by total sampling, geo-districts and by property type or use and by age of improvements. It must be able to perform detailed sales ratio reports by a minimum of 10 stratifications with a class type, perform analysis such as scatter grams, histograms, cross tabs, etc., to assist in completely reviewing analysis, final valuation estimates and public presentations.

   - Administration studies such as total land valuations and total valuations by town wide, geo-districts and property types or uses, including taxable and exempt properties.

7. The CAMA system must be able to develop and apply the final value estimate while displaying the supporting value approach on screen.

8. The CAMA system shall provide the capability of comparable sales selections and shall provide a market tested formula for multiple regressions. The system shall have the capability of selecting and adjusting comparable sales for use by the assessor in defense of values derived by all the recognized and accepted approaches to value.

9. The CAMA system shall be fully integrated so that the user can perform all day-to-day entry and editing functions, including the capability to override any programmed formula numbers.

10. All major functions shall be performed through on-screen menus. Whenever possible, programs shall be maintained by a "fill-in-the-blanks" process. The systems shall provide for "error" messages. Security devices to restrict access to various fields shall be provided.

11. All legal information necessary for the tax billing cycle shall be contained on the master file. This shall include: Owner name, exemption codes, exemption amounts, any special or preferential assessments such as current use assessments, etc. The CAMA system must have the ability to generate the N.H. Department of Revenue Administration "MS 1" report to be utilized by the CITY to submit to the DRA for tax rate determination.

12. The COMPANY shall provide at least 80 hours of user training on CITY premises and at least 80 additional hours of telephone assistance to the CITY regarding revaluation procedures and methods specific to the CITY. Once purchased, the software becomes the sole property of the CITY to only be used for the purpose for which it was purchased. There will be no annual license fee integral to the use or function of the system. Any yearly fee associated with technical assistance shall not have any effect on the use or functionality of the system.

13. Conversion of the existing database will be a joint effort between the CITY and the COMPANY. Conversion of data elements residing in the existing system to the COMPANY'S system shall be considered before signing of the contract. Upon completion of conversion, the CAMA system shall include conversion documentation, system documentation, user's manuals, and other support material. Software maintenance shall be available as part of an ongoing system support program.

14. The contract shall include provisions for the City to assess monetary penalties at a daily rate for failure to complete the contract by the negotiated deadline.

15. Include (3) tablet/mobile PC's with full data entry, sketching, parcel calculation and upload capabilities. Must be fully integrated with the host and imagery databases.

B. **SOFTWARE SPECIFICATIONS**

1. The CAMA system shall store and display the data that is collected for each parcel on both screens and reports. The system shall support the creation and analysis of separate inventory and sales history data files, store and apply factors and values to calculate cost and sales comparison estimates of value, generate sales ratio reports and support maintenance activities such as parcel splits, building permits, transfers, etc. The system shall provide for the production of mailing labels.

2. The CAMA system shall support valuation data for residential, commercial, industrial, vacant land, condominiums, manufactured housing and exempt properties.

3. The CAMA system shall be maintainable by the CITY personnel after installation and conversion and shall consider the pricing of additions and outbuildings by the cost approach, including adding appropriate depreciated values to the already "in place" assessed values in the system.

4. The CAMA system shall provide user controlled edit features, including capability of updating cost tables, depreciation factors and market adjustments.

5. The CAMA system shall have inquiry capabilities on all parcel information by map-lot-suffix, street address and owners name.

6. The CAMA system shall include on-line screens laid out to the property appraisal card with logical groupings of data on the screen designed to correspond to data elements on the data collection card.

6. The CAMA system shall have the capability to build an independent sales file with independent access for research, as well as maintenance of multiple sales for multiple years.

7. The CAMA system shall provide a maintenance function producing audit trail listings and totals showing the before and after status of the data. It shall also show persons responsible and the date of the change.

8. The CAMA system shall have report writer capabilities to create a variety of independent reports as developed and required by the assessor by selecting some or all fields that can be sorted as needed and totaled. Property record printouts shall be on plain paper not pre-printed data collection cards.

9. The data files must be in a common PC format (i.e. xBase) or an ODBC driver for at least 10 (ten) concurrent users must be provided. Alternatively, all data fields must be able to be imported or exported, quickly and easily, in an ASCII delimited format. Complete and accurate file definitions and layouts must be provided.

10. The software must meet all requirements of the State of New Hampshire and any

governing bodies within the State of New Hampshire. Any changes to meet future requirements shall be provided to the CITY at no additional cost(s).

C. **COST APPROACH MODULE SPECIFICATIONS**

1. This COST module shall include data management and cost valuation components for commercial, industrial and residential properties. It shall produce a valuation document showing the cost calculations on each property, the appraisers' adjustments and final value determination. The module shall access a maintainable table of replacement cost formulas and depreciation schedules that are keyed to a structure code (indicating what the improvement was built as or designed to be used for). It shall provide for correlation of the cost approach with the market approach through the use of economic condition factors as well as the standard depreciation for age, condition and functional obsolescence.

2. The CAMA system shall compute value estimates based on standard appraisal methodology (acceptable by the IAAO, Society of Real Estate Appraisers and the Appraisal Institute) with clear documentation for non-automated value computations and defense of values. The basic residential classification system shall identify property within frame type, quality class and floor area as a minimum; also values must be responsive to effective age. The component costs shall be easily understood in terms of cost new, depreciation and land value schedules.

3. The CAMA system shall provide for on-line updating of the data management file with the cost estimates. This includes the capability of pricing any additions or new outbuildings through the cost approach and adding the depreciated value to the market-generated solution.

3. The CAMA system software shall be adaptable to time and location indicators as well as possible neighborhood adjustment tables.

4. The cost approach shall be capable of calculating a value estimate by the square foot method.

5. The land pricing function shall utilize Computer-Assisted Land Pricing tables to provide location and land-use indexing for mass updating of land values. Land pricing should also have the ability to utilize preferential unit land values in addition to market-based unit land values.

6. Computed cost values for key fields shall be stored on a value history file of record. These would include RCN of each structure, RCNLD of each structure, land value, physical depreciation by structure and accrued depreciation by structure. The cost estimates shall be fully integrated with the market approach sub-system to develop reports to study depreciation schedules, land rate schedules, neighborhood factors, date of sale adjustments and certain cost adjustment factors. Cost schedule

additions shall not require program modifications. New codes can be added by updating cost schedules and data management libraries.

7. The CAMA system shall be capable of calculating both the ad valorem and market value, and current use value specifically dealing with current use.

8. The CAMA system shall be able to print detailed Cost Approach Valuation sheets.

D. MARKET APPROACH MODULE SPECIFICATIONS

1. The market approach module shall provide for data screening, segmented analysis, market model generation, model evaluation, value predictions, comparable selection, and adjustment of comparables and field review reports.

2. The market module shall produce market value estimates using comparable sales. It shall include the ability to extract properties that have sold from the master file and build a sales history file for sales analysis purposes. For each improved residential property to be valued, the computer shall select from the sales history file (3-5) comparable properties, which have sold recently. The comparable properties will be selected from the same neighborhood or area similar to that of the subject. The system shall include the ability to analyze sales ratio statistics by neighborhood, and/or neighborhood group as well as class. This shall provide the necessary information to make comparisons between classes, locations, and to identify categories of significant differences in value level or variance.

3. The CAMA system shall include the ability to analyze sales ratio statistics by neighborhood unit as well as class. This shall provide the necessary information to make comparisons between classes and locations and identify categories with significant differences in value level or variance. These categories can then be checked to determine if adjustments are required.

4. Comparable Sales Approach must allow constraints, if determined by user, otherwise adjustments should be market developed through multiple regression analysis, not based on cost adjustments only.

5. The system must have the ability to print and display on screen Comparable Sales Approach along with supporting valuation approaches.

E. SPECIFICATIONS FOR INCOME APPROACH MODULE

1. The income approach module contained in the system shall perform valuation by income capitalization. Methods of capitalization shall include one or more of the following: mortgage equity, discounted cash flow, gross rent multipliers, overall rates, and residual capitalization.

2. The CAMA system must have the ability to develop and apply Cost Approach and Income Approach to value through cost and income models.

3. The CAMA system must have the ability to develop up to 25 different types of income models and develop variations to income models within the 25 types, applied by location automatically by system, as defined by user.

4. The CAMA system should allow for adjustments to both the cost and income approaches as determined through analysis, by physical condition and/or accrued obsolescence and should apply this adjustment uniformly and automatically.

5. The CAMA system must automatically acquire and total all leasable square footage by type for purposes of valuation without user input or "override" requirement.

6. The CAMA system shall allow for adjustments to capitalization rate, vacancy, effective age, and expense ratio, by the reviewer, if desired. Otherwise, the system should apply income model modifications or adjustments for ease and consistency.

F. SPECIFICATIONS FOR DIGITAL IMAGERY

The following are requirements of fully integrated imagery package.

1. The digital imagery software must automatically upload digital images from camera utilizing a digital Camera.

2. The software must automatically update most recent image and archive previous image when importing/uploading.

3. The software must automatically update most recent image and archive previous image when importing/uploading.

4. Unlimited archiving of images as well as unlimited storage and management of scanned documents.

5. It must be able to print individual or batches of archived and current images.

6. Ability to select and print individual documents as well as availability of visual enhancements to assist when reviewing a document screen (e.g., control brightness, contrast, zoom, etc.).

7. Digital images must be fully integrated and displayed on host appraisal system and mobile devices with the ability to display on documents launched from appraisal and mobile devices system including property record cards.

8. Must be fully integrated with appraisal database for developing detailed sales book as required by State of New Hampshire.

G. TRAINING DOCUMENTATION AND MAINTENANCE

1.1 The COMPANY agrees to provide to the CITY, at no additional charge, all documentation for the system and conversion documentation (i.e. mapping, error reports, test results etc.) by no later than the completion date of the project. The documentation shall include comprehensive user manuals, which clearly explain data collection, data entry and all appraisal operations, systems and functions and other support material. A schematic system map shall be provided for the CAMA and related software.

1.2 The COMPANY agrees to provide to the CITY, at no additional charge, comprehensive training in use, and operation and technical aspects of the system on CITY premises. Such training shall be sufficient so that the CITY personnel shall be able to operate and understand the use and operation of the system and the appraisal process.

1.3 Software maintenance shall be available for three (3) years under the terms of the contract as part of an on-going system support program by the COMPANY for the benefit of the CITY.

H. HARDWARE SOFTWARE REQUIREMENTS

1. The COMPANY will provide any hardware and software requirement to include at a minimum the following:

> Workstation specifications including:
> - Processor speed
> - RAM
> - HD
> - Operating system
> - Any incompatibility with other applications
> - Video card and required resolution
> - Monitor
> - Printer
> -
> Server specification including
> - Processor speed
> - RAM
> - HD
> - Operating system
> - Any incompatibility with other applications
> - Video card and required resolution
> - Monitor
> - Printer

Network specifications including:
- Speed
- Any incompatibility

Additionally any requirements of firewall configuration, either workstation or network, must be noted.

IV. RESPONSIBILITIES OF THE CITY

The City shall provide all appropriate hardware associated with the conversion of the current CAMA system to the new CAMA system. Responses to the Request for Proposal shall include the COMPANY'S hardware requirements:

- Workstation specifications including processor speed and RAM minimum
- Hard Drive
- Operating system (Windows XP, etc.)
- CD Rom
- Anti Virus software
- Monitors
- Network Cards
- Modem
- Tape drive
- Laser printer

INSURANCE REQUIREMENTS

The Contractor shall purchase and maintain, until acceptance of the work, insurance of the limits and types specified below from an insurance company approved by the Owner, in addition to the following:

INSURANCE REQUIREMENTS

Insurance shall be in such form as will protect the Contractor from claims and liabilities for damages for bodily injury, including accidental death, and for property damage, which may arise from operations under this contract whether such operation by himself or by anyone directly or indirectly employed by him.

Amount Of Insurance

A)   Comprehensive General Liability:
         Bodily injury or Property Damage - $1,000,000
         Combined Single Limit, per occurrence

B)   Automobile and Truck Liability: Symbol 1
         Bodily Injury or Property Damage $1,000,000
         Combined Single, Limit, per occurrence

C)   Professional Liability:
         Errors and Omissions: $1,000,000
         Businesses shall provide a certificate of insurance demonstrating same.

Additionally, the contractor shall purchase and maintain the following types of insurance:

A)   Full Workers Comprehensive Insurance coverage for all people employed by the contractor to perform work on this project. This insurance shall be in strict accordance with the requirements of the most current laws of the State. The Contractor agrees to pay on the behalf of and hold harmless the City of Portsmouth for all claims arising in whole or in part from its work on behalf of the City.

Evidence of Insurance

As evidence of insurance coverage, the Owner may, in lieu of actual policies, accept official written statements from the insurance company certifying that all the insurance policies specified below are in force for the specified period. The Contractor shall submit evidence of insurance to the Owner at the time of execution of the Agreement. Written notice shall be given to the City of Portsmouth, New Hampshire at least thirty (30) days prior to cancellation or non-renewal of such insurance coverage.

Indemnification

The Contractor agrees to pay on behalf of and hold harmless the City of Portsmouth for all claims arising in whole or in part from its work on behalf of the City.

ADDITIONAL INSURED

All liability policies shall include the City of Portsmouth, New Hampshire as named Additional Insured.

       1) The contractor's insurance shall be primary in the event of a loss.

       2) The Additional Insured endorsement must include language specifically stating that the entity is to be covered for all activities performed by, or on behalf of, the contractor, including the City of Portsmouth's general supervision of the contractor.

Price Proposal

The price proposal items shown are items described in the scope of work, Section A, part 1. Should the vendor have accessories or items as part of their total package, the vendor should attach price information to this proposal.

Item #1 **Computer Assisted Mass Appraisal Software**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #2 **Maintenance Agreement**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #3 **Conversion Costs (In addition to base cost of CAMA system)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #4 **Mobile PC's (Three)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #5 **Training (80 Hours)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Price Proposal - Continued

Item #6 **GIS Module (Optional)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #7 **Appraisal Assistance (Optional)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Item #8 **Additional Training (Optional)**

_____   _____   _____
Unit price in words   **Unit price in figures**   **Total item price in figures**

Total Cost of Conversion (Excluding Optional Items)

_____   _____   _____
Price in words   **Price in figures**   **Total price in figures**

The undersigned agrees that he/she on behalf of Proposer has read the Request for Proposal document, and agrees to the terms, conditions and specifications set forth herein.

Proposer further agrees that this proposal is not made jointly or in conjunction, cooperation or collusion with any person, firm, corporation or other legal entity. Proposer agrees no officer, agent or employee of the Owner is directly or indirectly interested in this proposal.

Submitted by Authorized Agent:

_____

(Print Name & Title)

Signature: _____

Date: _____

Company: _____
Address: _____
City/State/Zip:_____
Telephone: _____
Fax: