

## **St. Joseph County, IN – Request for Proposal (RFP) for CAMA Software**

### **Introduction**

St. Joseph County, Indiana is seeking a long-term vendor / partner to provide Computer Assisted Mass Appraisal (CAMA) software for use by the St. Joseph County Assessor's Office.

### **Goals and Objectives**

The primary goals and objectives of this RFP process are to select a long-term vendor partner who:

1. Has a proven track record of efficient and effective CAMA software solutions.
2. Employs a dedicated development team capable of producing regular upgrades.
3. Facilitates proactive, supportive training for all end-users of the system.
4. Demonstrates dedication to ongoing quality and solution-oriented customer service.
5. Will work with St. Joseph County staff to help understand property tax related changes and plan for State of Indiana legislative change.

We anticipate selection of a vendor by Friday April 14, 2023.

### **Confidentiality**

This document is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review, use, disclosure, distribution, or copying is prohibited.

### **Proposal Costs and Conditions**

All costs incurred in the preparation of a proposal responding to this RFP will be the sole responsibility of the vendor and will not be reimbursed by St. Joseph County. All vendors submitting a proposal agree that St. Joseph County may select or reject a proposal or vendor for any reason.

### **Communications, Inquiries, and Questions**

All proposal questions and inquiries should be directed to [mcastellon@sjcindiana.com](mailto:mcastellon@sjcindiana.com). Vendors should not use other forms of contact, including phone, email, or in-person solicitation of county staff. All formal communication from St. Joseph County will come via the [mcastellon@sjcindiana.com](mailto:mcastellon@sjcindiana.com) email account.

### **Project Timeline**

Three (3) hard copies of your proposal must be received in a sealed envelope by Friday, March 31, 2023, at 12:00 PM EST. Please clearly mark on the envelope "CAMA RFP" and mail them to:

St. Joseph County Commissioners' Office  
County-City Building, 7th Floor  
227 W Jefferson Blvd  
South Bend, IN 46601

### **Schedule benchmarks**

Vendors are encouraged to note these dates prior to submitting a proposal:

- RFP release: Thursday, March 16, 2023
- RFP questions due (via email): Thursday March 23, 2023

## **St. Joseph County, IN – Request for Proposal (RFP) for CAMA Software**

- Release of County answers to RFP questions (via email): Friday, March 10, 2023
- Proposal due date: Thursday, March 30, 2023 @ 10:00 AM EST (NO exceptions)
- Proposals opened: Tuesday April 4, 2023 @ 11:30 AM EST
- Notification of finalist vendor(s) and next steps: Friday, April 7, 2023
- Vendor finalist selection(s): Monday April 10, 2023
- Optional activities as needed:
  - Site visits
  - Demonstrations
- Notification of vendor next steps: Wednesday, April 12, 2023
  - Letter of intent
  - Contract negotiations
- Contract signature date (goal): Tuesday, April 18, 2023
- Anticipated “go live” date for new CAMA system: Friday, August 20th, 2023.

### **Vendor Requirements**

Vendors will be required to illustrate their ability to provide required functionality, training, and customer support for their tools. The vendor proposal for services should include details of the CAMA application functionality, while highlighting the environment for users regarding data entry and viewing data, searching, processing, analyzing, and reporting tools.

The vendor will be expected to provide effective training given by employees that have extensive knowledge of the CAMA system. This training must be included as part of the contract.

### **Customer Support**

The selected vendor will be required to work directly with a designated representative at St. Joseph County to answer any support questions, address software issues, support with running reports, and ensure the software system is operational.

### **System Requirements Assessment**

As part of a complete proposal, vendors are expected to complete the attached System Requirements Assessment (SRA). The SRA outlines technology requirements, including end-user system criteria, which is required by your solution.

### **Proposals**

All proposals should be broken into the following sections:

- Cover letter
- Company overview
  - Primary contact person (name, address, phone number, email address)
  - Key personnel profile
  - Client references for at least three Indiana counties
  - Full government client list (required)
  - Include relevant experience with providing similar services
  - Disclosure if your company is under acquisition
- Overview of product

## **St. Joseph County, IN – Request for Proposal (RFP) for CAMA Software**

- CAMA features and functionality
- Description of services
  - Data conversion
  - Implementation
  - Training
  - Software support and maintenance
- Cost and fees broken down as follows:
  - Total cost
  - License fees (if applicable)
  - Data conversion (if applicable)
  - Implementation and installation costs (if applicable)
  - Customization costs (if applicable)
  - Annual costs associated with software support and maintenance as well as onsite meetings and training (including travel expenses)
- Systems Requirement Assessment (SRA) completion (attached)

Proposals should be limited to no more than thirty-five (35) pages total, including the completed SRA.

### **System Requirements Assessment (SRA)**

1. Please list all Indiana counties you currently serve.
2. Indicate which CAMA system(s) you have previously converted data from.
3. Does your software meet standards set forth by the State of Indiana as certified in accordance with 50 IAC 26?
4. What are the minimum hardware requirements needed to run your software?
5. Does your software require any third-party tools or software in order to be installed and function? If so, please list them, including supported versions.
6. Outline and list all other software, hardware, or application tool dependencies that your system requires to operate effectively.
7. Do you commit to having your software work on future versions of the Microsoft Windows operating system?
8. Does your software support exporting data in open or standard formats? If so, please list the formats supported by your software.
9. Is your software client/server based (installed on the PC or county server)?
10. Do you offer a SaaS, on premise (County hosted), or both solutions?
11. How often do you provide updates and upgrades to your software?
12. How do you make updates and upgrades available to your customers?
13. What type of database system does your software use (e.g. SQL Server, Oracle, etc.)?
14. Does your software integrate with Microsoft Office products, such as Excel or Word?
15. Does your software integrate with any other third-party applications? If so, please list any tools

## St. Joseph County, IN – Request for Proposal (RFP) for CAMA Software

with which you already have established integrations or provide integration support.

16. Does your software provide for the following?

- a. Ability to utilize income and expense data to generate values in an automated fashion within the system.
- b. Ability to utilize parcel and sale data to determine comparable properties and to generate values in an automated fashion using the sales comparison approach within the system.
- c. Ability to create and store ratio studies within the system.
- d. Ability to manage the scheduling of appeal conferences and hearings.
- e. Ability to store and manage images and audio files (e.g., jpg, tif, pdf, wav, mp3)
- f. Inclusion of sketch utility that is built directly into the system (e.g., not third-party software).
- g. Real Property improvement pricing that is sketch driven for data integrity purposes.
- h. Functions as a locally installed Client / Server application.
- i. Detailed internal tracking of complete Indiana Sales Disclosure data.
- j. Detailed internal tracking of Appeals data.
- k. Detailed internal tracking of Exemption data.
- l. Detailed internal tracking of Building Permit data.
- m. Production of all required reports, including but not limited to;
  - i. Indiana Property Record Card.
  - ii. Notices of Assessment.
  - iii. Indiana Sales Disclosure Form.
  - iv. Main and Auxiliary Indiana Personal Property Forms (e.g., 102, 103/S, 103/L, ERA, 103 N, O, I, T, 106).
  - v. Indiana Appeal Forms.