
Request for Information

RFI# 20-044

Computer Aided Mass Appraisal System Assessment



Wake County, North Carolina
Procurement Services
P.O. Box 550
Raleigh, North Carolina 27602

Responses are due July 23, 2020 before
4:00PM Eastern.



Table of Contents

1.0 Introduction 1

1.1 INTRODUCTION 1

1.2 PROJECT SCOPE 1

1.4 GENERAL RESPONSE REQUIREMENTS 22

2.0 General Response Requirements..... 44

2.1 RESPONSE CONTACT 44

2.2 RESPONSE SUBMITTAL REQUIREMENTS 44

2.3 RESPONDER EXPENSES 55

2.4 INTERPRETATIONS, DISCREPANCIES, AND OMISSIONS 55

2.5 SCHEDULE 55

2.6 NON-DISCLOSURE OF COUNTY INFORMATION 55

2.7 RETENTION OF RESPONDER MATERIAL 66

2.8 CONFIDENTIAL INFORMATION/PUBLIC RECORDS LAW 66

3.0 Detailed Submittal Requirements [Error! Bookmark not defined.](#)7

3.1 RESPONSE FORMAT [ERROR! BOOKMARK NOT DEFINED.](#)7

3.2 EXECUTIVE SUMMARY [ERROR! BOOKMARK NOT DEFINED.](#)7

3.3 COMPANY BACKGROUND [ERROR! BOOKMARK NOT DEFINED.](#)7

3.4 SCOPE OF SERVICES OFFERED [ERROR! BOOKMARK NOT DEFINED.](#)8

3.5 TECHNICAL REQUIREMENTS MATRIX [ERROR! BOOKMARK NOT DEFINED.](#)8

1.0 Introduction

1.1 Introduction

Wake County Government is issuing this Request for Information (RFI) to assist in determining the feasibility and estimated budget projections for an upgrade to a components of the County's existing Tax Collection system. This is an information gathering process to which a Request for Proposals (RFP) may be issued at a later date with detailed requirements and instructions. Submitting a response or not submitting a response to this RFI will not dictate your involvement in any future RFP. However, this RFI is your opportunity to present the services and functionality from your firm and product.

Wake County Government is located in Raleigh North Carolina. We serve a population of over one million. Our Tax Administration department consistently achieves one of the highest property tax collection rates in North Carolina and the Tax Collection software plays a significant role in enabling these results. Our current system was developed for and works well for the Tax Administration department, however, a complete technical refresh to a component of the software is needed.

Please note this process is designed solely to inquire about potential costs and services that are available and may not result in any further actions in any manner.

1.2 Project Scope

Wake County Information Services Division is looking for a vendor to partner with County IT staff and the Tax Administration department to help us to perform a technical refresh of components of our Tax Collection system. The first phase of the initiative is to complete a technical discovery/assessment of the current system and develop a high-level plan and project budget cost for services to modernize the Tax Collection system Computer Aided Mass Appraisal application and associated modules and batch jobs.

This technical assessment will include analyzing the existing module and determining what areas of the system need to have a technology refresh. This first phase will also include a high-level architectural vision for the proposed final system as well as an overview of proposed target technology. On-site meetings with County IT development staff and business units may be required during this phase.

To assist responders with the development of their proposal, the following system details are provided.



The Wake County CAMA system statistics consists of:

Infrastructure (4 environments, 42 WIN10 clients, 17 WIN2016 Virtual Servers, 7 databases)			
No of environments (dev, test, prod, rewrite/upgrade)	4		
No of Windows 10 developer machines (WIN10)	12		
No of Windows 10 revenue devices (WIN10)	42 (Touch enabled tablets)		
No of windows server 2016 Virtual Servers (WIN2016)	12		
No of databases	7		
(Citizen Centric) Public websites: 5, No of unique Taxpayer pageviews for FY18: 34,167,148			
No of Public Websites	2		
No of unique taxpayer pageviews for FY18	34,167,148		
C#/VB Code: 129 projects, 1,400,342 lines of code			
No of projects	129		
Lines of code (LoC)	1,400,342		
C#/VB Files: 6,171			
C# source files	4,694		
ASPX Forms files	737		
ASCX Server controls files	138		
JavaScript files	279		
Crystal Report files	86		
Income Model (visual basic app) files	146		
Income Model Crystal Reports files	91		

Also, please see CAMA overview document attached.

1.4 General Response Requirements

When responding to this RFI, please follow all instructions carefully. Please submit responses according to the outline specified and submit all hard copy and electronic documents according to the instructions. By virtue of submitting a response, interested parties are acknowledging:

- 1.4.1 Responses shall be for informational and budgetary purposes, and for the evaluation of this request.

- 1.4.2 Responses will be received by Wake County Government at the time and place so stated in this document. At that point, Wake County will close the receipt of responses and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process.

Wake County, solely at our option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Realizing the nature of a competitive environment and protecting the integrity of the process, respondents are not to contact any county staff or elected official in reference to the process. As information becomes available and is relevant for release, that information will be shared with respondents. Any and all information submitted in conjunction with this RFI and the evaluation process will not be returned to the respondent.



2.0 General Response Requirements

2.1 Response Contact

Responses should be directed to Procurement Services, specifically to the Purchasing Director, as outlined below. In regard to this RFI, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, or Board of Commissioner members during the period beginning with the issuance of this document through evaluation unless authorized by the response contact.

Response Contact:

Tom Wester
Wake County Finance Dept - Procurement Services
Wake County Justice Center, 2nd Floor – Ste 2900
301 S. McDowell Street
Raleigh, NC 27601
twester@wakegov.com
919-856-6153

2.2 Response Submittal Requirements

In order to facilitate the analysis of responses to this RFI, responders are required to prepare their responses in accordance with the instructions outlined in this part and elsewhere in this RFI.

Three (3) hard copies and an electronic copy on CD (.doc, .xls and .pdf versions) must be submitted containing the entire contents of your response to the address shown below.

Mailing Address:

Tom Wester
Wake County Finance Dept - Procurement Services
Wake County Justice Center, 2nd Floor – Ste 2900
301 S. McDowell Street
Raleigh, NC 27601

The County must receive responses **BEFORE 4:00 PM** July 23, 2020. *The responder's name, RFI number, and response closing time and date must be marked clearly on the response submission.* The time of receipt shall be determined by the time clock in the Wake County Procurement Services office. Late responses will not be accepted. The County will not be held responsible for the failure of any mail or delivery service to deliver a response prior to the stated due date and time. It is solely the responder's responsibility to: (1) ascertain that they have all required and necessary information, documents and



addenda, prior to submitting a response; (2) ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be reviewed.

2.3 Responder Expenses

Please be sure your RFI response addresses any necessary travel and lodging expenses or any other expenses applicable to the development of this RFI. The County will not be responsible for any expenses incurred by any responder in the development of a response to this Request for Information or any other activities associated with this request that are not included in the response.

2.4 Interpretations, Discrepancies, and Omissions

Should any proposer find discrepancies, omissions or ambiguities in this RFI, the responder must at once request in writing an interpretation from the response contact listed in Section 2.2. All questions submitted must be in writing.

The deadline for submitting questions is **June 12, 2020**. All questions will be answered to the extent possible in the form of addenda to the specifications and shared with known interested parties. All written requests for clarification should be addressed to the attention of Tom Wester.

Failure to request an interpretation will be considered evidence that the Responder understands the provision of the RFI.

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect.

2.5 Schedule

Action	Applicable Dates
RFI Release	May 18, 2020
RFI Question Deadline	June 12, 2020
RFI Responses Due before 4pm	July 23, 2020

2.6 Non-disclosure of County Information

All data and information gathered by the responder and its agents, including this RFI and all reports, recommendations, specifications, and data shall be treated by the responder and its agents as confidential. The responder and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.

2.7 Retention of Responder Material

The County reserves the right to retain all responses. No responses will be returned to responder.

2.8 Confidential Information/Public Records Law

INFORMATION SUBMITTED IN RESPONSE TO REQUESTS FOR BIDS, PROPOSALS, AND OTHER PROCUREMENT METHODS SUBJECT TO PUBLIC RECORDS LAW

Wake County is subject to North Carolina's Public Records Act located in Chapter 132 of the North Carolina General Statutes. As a result, information submitted to and received by Wake County in response to a Request for Proposal/Request For Bid/Request For Quote/Request for Qualifications, or any other procurement method (collectively "Procurement Process"), is considered public record and may be released for public inspection after the contract award, or as otherwise permitted under NCGS § 143, without further notice to the proposer. The County does not intend to elicit confidential or trade secret information in response to a Procurement Process and assumes no responsibility for the submission of such information. Wake County reserves the right to share any information submitted in response to a Procurement Process with any person(s) or firm(s) involved in the review and evaluation phase of the Procurement Process.

CONFIDENTIAL OR TRADE SECRET INFORMATION

If a proposer nonetheless submits information in a bid proposal or other response to a Procurement Process and it considers such information to be confidential, then all four requirements of [NCGS 132-1.2](#) "Confidential Information" must be met for the County to consider withholding the information from public inspection in response to a public records request. **Among other legal requirements, information deemed to be "confidential" or "trade secret" by proposer must be clearly marked as such on the face of the document(s) at the time of the initial disclosure/submittal of RFP.** In addition, although not required by law, Wake County requests that any proposer who submits a proposal or response containing any such designation of confidentiality also submit a second copy of the proposal or response with the respective page(s) or section(s) redacted. The County will not agree to withhold an entire proposal or response from public inspection; thus proposers should refrain from including blanket restrictions on disclosure or all-encompassing claims of confidentiality.

When a public records request is made for information contained in or attached to a proposal or response that has been clearly marked as "trade secret" or "confidential" upon its submission, Wake County may, in its discretion and without further notice, release the redacted copy of the proposal or response to the requester if one has been previously submitted. Otherwise, the proposer will be notified of the request and given an opportunity to provide within a reasonable period a written explanation of the basis for claiming protection under N.C.G.S. 66-152 and N.C.G.S. 132-1 and/or a redacted proposal or response. The County shall make the final determination on release of the information. Should any civil action be brought against the County in an effort to compel or prevent the disclosure of information contained in a proposal or response that is deemed confidential by a proposer, the proposer may participate at its own expense; and by deeming any information in a proposal or response confidential, proposer further agrees to indemnify and hold harmless the County for and against any costs incurred by the County as a result of such litigation, including but not limited to fees or expenses arising out of N.C.G.S. 66-153 and N.C.G.S. 132-9.

3.0 Detailed Submittal Requirements

3.1 Response Format

Responders shall prepare their responses in accordance with the instructions outlined in this section. Responses should be prepared as simply as possible and provide a straightforward, concise description of the responder's capabilities to satisfy the requirements of the RFI. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. The response should be organized into the following major sections:

Response SECTION	TITLE
	Title Page
	Letter of Transmittal
	Table of Contents
1.0	Executive Summary
2.0	Company Background
3.0	Scope of Services Offered
4.0	Technical Requirements Matrix

Instructions relative to each part of the response to this RFI are defined in the remainder of this section. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

3.2 Executive Summary

(Proposal Section 1.0) This part of the response to the RFI should be limited to a brief narrative summarizing the response. The summary should be oriented toward the business personnel who would use the solution or services and should include technical information and language only to the extent required to describe the solution.

Please note that the executive summary should identify the primary engagement contact for the responder. Contact information should include a valid e-mail address, fax number, and a toll-free telephone number.

3.3 Company Background

(Proposal Section 2.0) Each response must provide the following information about the responder's company. The County, at its option, may require a responder to provide additional support or clarify requested information.

Background information shall include:

1. How long the company has been in business.
2. A brief description of the company size and organizational structure.
3. Company locations.
4. How long the company has been selling the solution or service to clients similar to the County.
5. Listing of clients with contracts of similar scope and size to the County's by name and state.
6. A brief description of any pending litigation.
7. Evidence that the vendor is a corporation, is in good standing and qualified to conduct business in North Carolina.
8. References from at least 3 customers.

3.4 Scope of Services Offered

(Proposal Section 3.0) This section of the response should include a detailed discussion of the responder's overall understanding of the project and the solutions and services that can be provided to support Wake County.

3.5 Technical Requirements Matrix

(Proposal Section 4.0) This section of the response should include:

1. An overview of the responder's modernization strategy;
2. A technical vision of the project (proposed technologies, architecture, etc.);
3. Information on processes (approach for initiative and how you plan on managing project, control quality, source control, which tools are used, etc.);
4. Information demonstrating the technical knowledge (including qualifications) of all key personnel involved in the implementation in the proposed scope of work (experience, resumes, training, certifications, etc.);
5. Database recommendations;
6. Project plan (stages and timeframe);
7. Plans for ongoing project support;
8. Proposed Meetings / Overview requirements with Wake County resources (technical & business);
9. Transition and training plan for when refresh is completed and transitioned back to Wake County staff for ongoing support;
10. Software security measures in place;
11. Budget assessment (including total project costs, specialists' rates, costs of project support, on-site, travel expenses, possible additional expenses, etc.).