

Request for Proposal

Fulton County Integrated Property Tax Assessment
(CAMA), Extension and Collection System & Public
Portal

RFP 2024-001



Issue Date: September 16, 2024

REQUEST FOR PROPOSAL (RFP 2024-001)

Fulton County Integrated Property Tax Assessment (CAMA), Extension and Collection System & Public Portal

Sep 16th, 2024

The County of Fulton invites you to submit proposals in accordance with the requirements documented within this Request for Proposal (“RFP”). You must carefully read the attached documents and follow the procedures as outlined to be considered for evaluation and selection. Please refer to section II for complete instructions for submissions.

The proposal shall include the entire response to this Request for Proposal document and any amendments which may subsequently be issued. Proposals received after the deadline stated in this RFP will be considered a late and will be disqualified from further consideration.

Thank you for your interest in this Request for Proposal.

Sincerely,

John Spangler
Fulton County Board Chairman

I. INTRODUCTION AND GENERAL INFORMATION

Fulton County, Illinois (the "County") is requesting proposals for an Integrated Property Tax Assessment (CAMA), Extension and Collection System and Public Portal

The County has a population of 33,609 according to the 2020 U.S. Census. Lewistown is the county seat. In Revenue Year 2023 the County consisted of 27,987 total real estate parcels of which there were 16,357 residential, 167 industrial, 1,411 commercial, 7,697 farm, and 2,355 other parcels.

The Property Tax System currently in use in the County is currently DEVNET.

II. INSTRUCTIONS TO PROPOSERS

1. All proposals shall be submitted in by hand, in hard copy and .pdf format to, electronically mailed or other courier service :
Patrick O'Brian
Fulton County Clerk & Recorder
P.O. Box 226
Fulto County Courthouse Room 105
Lewistown, IL 61542
pobrian@fultoncountyilelections.gov
2. Six hard copy responses to this RFP must be delivered in a sealed envelope clearly labeled "RFP 2024-001 – Integrated Property Tax Assessment, Extension and Collection System & Public Portal" In addition, one digital/electronic copy of your response to this RFP must be submitted to the email listed in paragraph 1. All proposals must be received by 4:00 pm Central time on Tuesday, October, 7th 2024. Proposals arriving after the deadline will not be accepted.
3. Proposals should provide a concise and accurate description of Proposer's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
4. An authorized representative of the Proposer must complete and sign the proposal.
5. Failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.
6. In submitting information, it is understood by the undersigned that the right is reserved by the County to accept any submissions, to reject any and all submissions, and to waive any irregularities or informalities which are in the best interest of the County.

7. Addendum to the RFP and any additional information will be posted at <http://www.fultoncountyil.gov/>
8. Questions regarding this proposal can be directed to any of the following:

Julie Russell, Fulton County Supervisor of Assessments

jrussell@fultonco.org

Staci Mayall, Fulton County Treasurer

smayall@fultonco.org

Patrick O'Brian, Fulton County Clerk

pobrian@fultoncountyilelections.gov

Thad Chaney, Fulton County IT

administrator@fultonco.org

III. GENERAL REQUIREMENTS AND SCOPE OF SERVICES

In this section answer Yes or No. In the comments field please enter if this is in Development. If in Development, please identify if it will be included in the overall cost of the software as part of the development plan. If you answer no, or in-development, please provide a detailed explanation.

System Features and Functionality	Y/N	Comments
GENERAL REQUIREMENTS		
Must be a system that uses industry-standard architecture such as Windows server 2012r2 OR 2016. The system must be a Windows based solution.		
The system must reside on a SQL Server Database.		
The new system must be linked to the various County Property Tax Offices by a live connection.		
Software must be the latest compliant tested release.		
The system should allow the option of real time processing or batch processing.		
The system should allow effective dating of transactions.		
The system shall be an on-line, interactive, menu driven, solution that is user-friendly and reasonably easy to learn utilizing Microsoft technology.		
Menus have drill-down capabilities for detailed inquiry.		
The County and the vendor must agree on the fields provided by the system prior to contract signing. The system must be able to add data elements during installation and with minimum modifications once installation is complete.		
<u>Multiple Years</u>		

	<ul style="list-style-type: none"> a. The system must be able to maintain at least 25 years of information per parcel record. b. Parcels should not be deleted, but the status should be changed to reflect that records are inactive. 		
	<p><u>Audit/Change Tracking Capabilities</u> The system must record user logins and logouts for transaction logging. Moreover, the system must track the identification of the person to enter or last update any information, record or data element in the system for “audit trail” purposes.</p> <p>The system shall produce an audit report listing: date, time, parcel number, user name, command, field name, original data, and changed data. This report must be able to be run based on a date range or parcel number.</p>		
	<p><u>Security/Permissions</u></p> <ul style="list-style-type: none"> a. The system shall provide standard and custom-definable security levels to allow or restrict access precluding inappropriate access or changes to critical data. b. Highly customizable security model. Must be able to assign read-only or write privileges on a per field, per tab or per module basis to roles/groups. c. The system must provide file maintenance activity audit trails. d. Audit trails to track data changed by user name and date of change. e. Capability to reset passwords for a user by System Admin 		
	<p><u>Application User Interface</u></p> <ul style="list-style-type: none"> a. The System must provide a user friendly graphic user interface (GUI). b. The interface must comply with industry standard design and implementation best practices when developing for a Microsoft desktop OS. c. The system should have the ability to open up new screens into a separate window. This is convenient for those users with dual monitors that want to view two sets of data at one time. d. The application must have an Internet Web browser-based interface for access 		

	<p>to parcel information, including document images.</p> <ul style="list-style-type: none"> e. It must be designed with intuitive interfaces that lead the user systematically through each process. f. The data entry process must be customizable to facilitate rapid data entry. Data fields for a single process should be kept on a single screen whenever possible. g. Desired functionality will include the ability to tab between boxes, auto-populate and auto-complete features, field controls (i.e., require four-digit dates), copy and paste fields and records, clear difference between user editable and non-editable fields, and efficient menu items (i.e., checklists, multiple selection menus, radio buttons, browse and attach buttons, drop-down menus, pop-up navigation menus). h. The current parcel should stay active as the user moves between screens or forms. 		
	<p>Users of the system must be able to easily update cost tables, depreciation factors, market adjustments, and any other user-entered variables used by the system to calculate property values.</p>		
	<p>Must allow for Import/export data (including historical assessment data) and reports to commonly used desktop application software.</p>		
	<p>The system must provide a building sketch function, preferably APEX Sketch that will calculate areas and perimeters and automatically store the results in predefined fields in the property record for the purposes of calculating value.</p>		
	<p>Must support compatibility with Esri software and ortho-imagery in an Esri mosaic raster dataset and/or image service</p>		
	<p>Ability to associate OCR scanned documents or other electronic images/documents including property photos with the data collected by the system.</p>		

	Allows internal imaging capability inherent to the system, allowing digital images and scanned documents to be attached to the parcels.		
	The system shall have a separate sales file capable of maintaining inventories of sold properties at the time of sale with a document reference that may be different from the current valuation inventory.		
	Enables the ability to copy record characteristics from one to another or to a group of records.		
	Enables query functions or "drill down" capabilities at the field level to support reporting and analysis at the desktop.		
	Supports notes or memos to be entered. Both public and private.		
	The system must provide a vendor designed and County approved electronic property record card for all types of properties, with labeled sketch and assessment data.		
	Allow for Customer inquiry capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc.		
	Provides a remote field data collection solution for Tax Assessment, allowing the ability to download and upload file information for field inspections.		
	The system must accommodate the ICAAS replacement cost systems with depreciation tables. Must also be able to accommodate user defined cost tables. The cost tables shall allow for calibration by the user and support interpolation between areas in the cost tables.”		
	Major valuation methods available with the system must include the table-driven cost approach, comparable sales analysis and income approach.		
	The system shall have the capability of computing standard assessment statistical analysis such as mean, median, sales ratios, coefficient of dispersion, price related differential, and other tests of the level and		

	equality of assessments. The ability to download this data into standard statistical packages or spreadsheets, such as Excel, is required.		
	Allow for Customer inquiry capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc.		
	The system shall include report writing capabilities that allow the user to analyze data and obtain user-defined printouts.		
	Proposed software must currently be in use in at least five counties in the State of Illinois. All five Counties have had to complete a full tax cycle through the system.		
	Software vendor must provide updates to programs reflecting any legislative changes enacted by the state of Illinois as part of regular maintenance and support.		

CAMA Functionality	Y/N	Comments
Comprehensive Sales Ratio Studies		
Market Analysis through Multiple Regression Analysis		
Assessment Administration		
Parcel transfer and conveyances		
Appeal Processing and Scheduling		
Manufactured Homes		
Full Imaging Capability		
PDF Creation of a computer generated notices		
Building Permit Tracking		
Proposed software must be able to run in a multi-user, multi-tasking environment with multiple users updating the same file.		
Support online mass assessment, to assess multiple properties by several group types including: Subdivision, Neighborhood, Location, Structure type/class, Property type, User defined group. Must also support compatibility with Eagleview Software and imagery/data upload into the CAMA or Property Tax Assessment Maintenance Module.		

	Support standard approaches for property valuation: <ul style="list-style-type: none"> • Cost approach • Income approach • Market analysis approach 		
	<ul style="list-style-type: none"> • Income approach (for commercial properties only) • MRA (multiple regression analysis). 		
	Unlimited field size to describe property dimensions.		
	Allow appraisers to manipulate and override cost data and factors, including depreciation factors, class, class adjustment, and land values, to reflect local market conditions.		
	Store and display an assessment method code, from a table, to indicate how the property was valued for all property types.		
	Interface with ICAAS cost system with depreciation tables. Allow cost tables to be calibrated by appraisers and support interpolation between areas in cost tables.		
	Provide flexibility for appraisers to specify unique or tabled features to property when standard cost approach yields unsatisfactory results.		
	Flag properties for review where major departures from cost table standards have occurred.		
	Store sales information including tracking of remarks and listing the individual who provided the information.		
	Support modeling functions based on the income approach & market approach for assessment.		
	Provide any third party software necessary to run the primary CAMA module including any associated fees related to purchase or use of said software		

PARCEL MAINTENANCE PROGRAM		Y/N	Comments
	Supports multiple street addresses assigned to one parcel (e.g. ownership of condo or apartment complex).		
Parcel Code Tables			

	Store unlimited number of tabled parcel code types and maintain text description for each code.		
Parcel Record Maintenance			
	Maintains parcel sale history including		
	Previous owner history.		
	Deed of trust amount.		
	Instrument of sale (table driven).		
	Type of financing: Sale Date, Sale Amount.		
	Unlimited number of transactions.		
	Ability to transfer structure or structures from one parcel to another.		
	Supports parcel splits, subdivisions or combinations.		
	Support parcel parent/child history.		
	Record and track all changes to map reference numbers.		
	Prompts user to edit tax exemption codes when property changes ownership.		
	The system must be able to access historical data including full assessment change history, board of assessment appeals dockets, sales and property characteristic information by year.		
	Support separate property descriptions for outbuildings and improvements.		
	Enable the sketching of rounded surfaces and other curved areas, reversal / rotation of a sketch, and irregularly shaped areas.		
	Attach scanned images of building sketches and photos/files to the parcel record.		
	Automatically calculate property dimensions and square footage from existing and future sketches and use this calculation to value the improvements within the system.		
	Record detailed physical characteristics for a property, with the ability to describe each building on a property separately.		
	Copy sketches from one parcel to another by providing a template for property with similar new construction.		
	Copy user defined parcel characteristics in batch at year-end, based upon user criteria, to new year parcel records.		
	Apply adjustments (e.g., corrected assessments) to current year records, prior year records or both, after taxes have been billed.		
	Apply adjustments in batch mode or on-screen in real time.		

Reporting & Querying			
	Provide ability to view all real property owned by an individual entity, regardless of type.		
	Produce a comparable sales query and report.		
	Query comparable neighborhoods and view neighborhood data on screen.		
	Display (e.g., on a single screen) the assessed values for land, improvements, etc. for a parcel across multiple years.		
	Flag difficult properties for special handling.		
	Produce reports that will summarize change in assessment, by property, by day.		
	Query property by any field to check for duplicate records.		
	Allows inquiry into account information by entering a number or a range of number: <ul style="list-style-type: none"> • Parcel numbers • Permanent ID/Account # • Account name • Current Owner • Property Address • Multiple parcel types • Legal description • Mailing address • Street address • Map & Parcel 		
	Have the ability to print to: <ul style="list-style-type: none"> • Local Printer • Network printers • PDF file 		
	System capability to lay out and print forms such as assessing notices, field inspection sheets, sales surveys, labels etc. on blank paper and card stock such capabilities to exist on demand and in batch format.		

Year End Processing			
	Freezes assessment valuations for the year once certified.		
	Retains assessment certifications by year for each parcel for an indefinite period.		
	Automatically create new year property records based upon the prior year records.		
	Automatically create new year reference table records based upon the prior year records.		

USER INTERFACE	Y/N	COMMENTS
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	Options to interface field data collection equipment (e.g. electronic tablet, laptop) available.		
	Allow users the ability to “Copy, Cut and Paste” text from this program to any other Windows based program.		
	Allow user to correct errors without re-input of entire transaction.		
	Allow user to override transaction warnings (e.g. invalid parcel number), as long as user has appropriate level of assigned security.		

OTHER FEATURES		Y/N	COMMENTS
	Provide the ability to create indexed views directly from CAMA data tables		
	Provide CAMA data table relationships, i.e. primary/foreign keys		
	Public facing web-based interface (portal) designed using WCAG 2.0 Level A and AA guidelines for accessibility		
	Public facing portal must have the ability to display parcel number, site address, owner information, tax status, values, and rates, legal descriptions, billing, assessments, exemptions, farmland information, parcel genealogy, taxing bodies, payment history, sales history, structures, forfeitures, redemption, parcel maps, and tax bills		
	Public facing portal must have the ability to display previous years information, up to 20 years prior to current tax year		
	Public facing portal should be hosted by the Proposer and all associated fees must be included		
	Mobile Home Tax Extension and Collection module		
	Tax Sale Redemption and Judgement Book Module		
	On-Demand printing of Extension Reports for Taxing Districts		
	Data Conversion – Convert 25 years of assessment, extension and collection data from current system		
	Farmland soil types and calculations including five year drainage reductions		
	Transfer of existing neighborhood delineations into new system		
	Ability to add additional property use codes as required by the state wide property use coding system		

	<p>Tax Extension procedures include</p> <ul style="list-style-type: none">• Triggered abatements for overlapping township/village street and bridge funds• Triggered abatement for overlapping County-wide Health Department and Public Health District• Multiple Enterprise Zones with different abatement percentages• Multiple Tax Increment Financing districts• State Railroad assessments in Tax Increment Financing Districts• Bond fund loss in collection calculation• Property Tax Extension Limitation Law (PTELL) calculations		
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IV. EVALUATION PROCEDURE

An evaluation committee, consisting of representatives from the Fulton County Information Technology Department, the Fulton County Assessment Office, the Fulton County Clerk's Office and the Fulton County Treasurer's Office shall review the proposals submitted.

After each proposal has been evaluated on the basis of the Vendor's approach to meeting Fulton County needs, the field of candidates will be narrowed to the two or more best qualified firms. Fulton County expects to ask for references related to quality of service and ability to deliver, after choosing the top contenders. Each of these firms may then be invited to an interview at which time each firm will be given an opportunity to answer questions of the evaluation committee.

1. All proposals must include at least five (5) references, complete with contact names from each office holder, address, telephone number, e-mail address and connection to the Proposer. The County reserves the right to contact additional individuals associated with the Proposer.
2. All Proposers should demonstrate to the County that the Proposer has the capability, experience and resources to perform the requirements of this request, and that it has the integrity, experience and reliability to ensure good faith performance in meeting the expectations of this request for proposal, should the Proposer's offer be accepted.
3. All proposals should include an implementation plan including system design and hardware specifications.
4. The County reserves the right, at its sole discretion, to terminate this process at any time, or reject any and all proposals without penalty. Priority for the final selection will be given to those proposals that best meet the requirements set forth in the RFP and are in the best interest of the County.
5. All proposals must include all-inclusive costs including software licensing, annual support, third party software licensing that may apply, implementation and training.
6. The County reserves the right to request clarification of information submitted and to request additional information of one or more applicants.
7. The County shall not be responsible for any costs incurred by the Proposer in preparing, submitting, or presenting its response to the request for qualifications.
8. All proposals submitted to the County are subject to the Illinois Compiled Statutes Chapter 5, Section 140 (5 ILCS 140/Freedom of Information Act). Any information

submitted in a proposal which the Respondent considers to be proprietary or otherwise exempt from disclosure, the Respondent must invoke, in writing, the exemption(s) to disclosure provided by 5 ILCS 140/Freedom of Information Act in its proposal by providing the specific statutory authority for claimed exemptions, identifying the data or other materials to be protected, and stating the reasons why such exclusion from public disclosure is necessary.

9. All proposals must include a tentative timeline & estimated cost for the implementation of the newest ICAAS manuals for Residential (2020 ICAAS or newest available at time), Commercial & Industrial (2020 ICAAS or newest available at time), Farm (2024 ICAAS or newest available at the time), & Component in Place (2019 ICAAS or newest available at time).

Furthermore, to designate portions of the bid as confidential, the Respondent must:

Mark the cover page as follows: "This proposal includes trade secrets or other proprietary data."

Mark each sheet or data to be restricted with the following legend: "Confidential: Use of disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal."

Provide an electronic, redacted copy of the entire bid or submission in .pdf format for posting on the County's website for public inspection. Respondent is responsible for properly and adequately redacting any proprietary information or data which Respondent desires remain confidential. If entire pages or sections are removed, they must be represented by a page indicating that the page or section has been redacted. Failure to provide an electronic version of a redacted copy may result in the posting of an un-redacted copy.

Indiscriminate labeling of material as "Confidential" may be grounds for deeming a bid as non-responsive.

Fulton County will make the final determination as to whether information, even if marked "confidential," will be disclosed pursuant to a request under the Freedom of Information Act or valid subpoena. Respondent agrees not to pursue any cause of action against Fulton County or its agents for its determination in this regard and disclosure of information. At some point after proposal opening, all opened proposals will be made available for public inspection consistent with 5 ILCS 140/Freedom of Information Act. If a contract is awarded through this RFP, the awarded contract will also become a public record consistent with 5 ILCS 140/Freedom of Information Act. The County has the right to use any or all information/material submitted. Fulton County reserves the right to make an award to the Respondent offering a proposal in the best interests of the County and meeting all the requirements of this RFP.

IV. PROPOSAL FORMAT

The proposal must be presented in the order as requested. To be considered substantive, the proposal must respond to all requirements of this part of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal.

V. TIMELINE

Publication of RFP in local newspaper the weeks of	September 16th, September 23rd, 2024
Questions Due	September 25th, 2024
Addendum or Addenda Issued	September 27th, 2024
Proposals Due – Bid Deadline	October 7th, 2024
Select Qualified Respondent and make recommendation to County Board	October 8th, 2024
County Board Approval	October 8th, 2024