**STATE OF MAINE**

**Department of Administrative and Financial Services**

*Maine Revenue Services / Property Tax Division*



**REQUEST FOR INFORMATION**

**RFI#201808162**

**Computer-Assisted Mass Appraisal Application**

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| --- | --- |
| **RFI Coordinator** | *All communication regarding this RFI must be made through the RFI Coordinator identified below*.  **Name:** Justin L. Poirier **Title:** Director, Property Tax Division  **Contact Information:** [justin.l.poirier@maine.gov](mailto:justin.l.poirier@maine.gov) |
| **Submitted Questions Due** | *All questions must be submitted to the RFI Coordinator identified above by:*  **Date:** August 28, 2018, no later than 5:00 p.m., local time |
| **Response Submission** | **Submission Deadline:** September 18, 2018, no later than 5:00 p.m., local time  **Submit to:** [justin.l.poirier@maine.gov](mailto:justin.l.poirier@maine.gov) |

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**RFI DEFINITIONS/ACRONYMS**

The following terms and acronyms shall have the meaning indicated below as referenced in this Request for Information:

1. **RFI:** Request for Information
2. **RFP:** Request for Proposal
3. **State:** State of Maine
4. **Department:** Department of Administrative and Financial Services
5. **FOAA:** Maine Freedom of Access Act
6. **Respondent:** Any individual or organization submitting a response to this RFI.
7. **CAMA:** Computer-Assisted Mass Appraisal
8. **SaaS:** Software-as-a-Service
9. **COTS:** Commercial off the shelf
10. **UT:** Unorganized Territory
11. **MRS:** Maine Revenue Service
12. **PTM:** Property Tax Manager System

**State of Maine - Department of Administrative and Financial Services**

**RFI#201808162**

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# **PART I INTRODUCTION**

## A. Purpose and Background

This Request for Information is an information gathering and market research tool, not a formal solicitation of a specific requirement (such as in a “Request for Proposals” document). The Department of Administrative and Financial Services is seeking information regarding Computer-Assisted Mass Appraisal applications from interested parties as defined in this RFI document. This is an opportunity for interested parties to help the Department better understand a marketplace and/or specific subject matter.

Maine Revenue Services (an agency of the Department) through its Property Tax Division is responsible for the assessment and collection of property taxes in the state’s Unorganized Territories. The UT consists of over 400 townships, plus many coastal islands that do not lie within municipal bounds. The UT land area is slightly over one half the area of the entire State of Maine. Year-round residents number approximately 9,000, with many more people seasonally residing in the UT. Much like an assessor's office, the division maintains records of all property ownership in the UT and has over 700 UT tax maps. There are nearly 20,000 real estate and 1,500 personal property tax accounts maintained by the division. Much of this area is in very remote areas of the State, with little or no connectivity to Wi-Fi or cellular phone service.

The current CAMA legacy application is approaching end of life status. The Department recognizes the burden non-enterprise systems place on State of Maine Office of Information Technology and the limited agency budgets for supporting them. The Department is interested in information for both SaaS and COTS solutions.

## B. General Provisions

1. All contact with the State regarding this RFI must be made through the aforementioned RFI Coordinator. No other person/ State employee is empowered to make binding statements regarding this RFI.
2. This is a non-binding Request for Information. Therefore, no award shall be made as a result of the RFI process.
3. Issuance of this RFI does not commit the Department to pay any expenses incurred by a Respondent in the preparation of their response to this RFI. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
4. Issuance of this RFI in no way constitutes a commitment by the State of Maine to issue a Request for Proposal (RFP).
5. All responses should adhere to the instructions and format requests outlined in this RFI and all written supplements and amendments, such as the Summary of Questions and Answers, issued by the Department.
6. All submissions in response to this RFI will be considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) (1 M.R.S. §§ 401 et seq.).

<http://www.mainelegislature.org/legis/statutes/1/title1sec401.html>

1. All applicable laws, whether or not herein contained, shall be included by this reference. It shall be Proposer’s/Vendor’s responsibility to determine the applicability and requirements of any such laws and to abide by them.

# **PART II INFORMATION SOUGHT**

MRS is responsible for the assessment and collection of real and personal property taxes in the UT. MRS administers the assessment and collection program with the assistance of two legacy applications developed by two separate vendors nearly 20 years ago. MRS is looking to replace its CAMA system and integrate it into the current Property Tax Manager (PTM) application. The two current legacy systems are described below.

**Property Tax Manager**

PTM is our billing and collections system. It is used to generate mill rates for the 13 counties with UT townships.  The mill rate is made up of 3 components – county services, state services and county tax.

PTM is also the system that generates all the reports and notices to taxpayers including tax bills, late notices, lien warning notices, liens, foreclosure notices.  Payments are posted from third party software to PTM and associated with the appropriate account.  Statistical summary reports are generated from this system as well.

PTM is the system of record for all the following:

* Exemptions: homestead, veterans, exempt properties, Business Equipment Tax Exemption, etc.
* Demographics: ownership transfers, address changes, map/plan/lot information, mortgage companies and third party relationships.  Contact information and transfer information (book/page, selling price).
* Other information:
  + Onsite inspection date, and directions to the parcel.
  + Events: Running the monthly interest job, lien discharge cycle, supplement/abatement cycle, all notices except tax bills.

**Computer Assisted Mass Appraisals**

Our CAMA system is used to determine the assessed value for all taxable and exempt property, land and buildings.  The system also holds pictures of each structure and a sketch of the structure.

Total assessed value is transferred to PTM.

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MRS is seeking information regarding the replacement of its current legacy CAMA system with a mature vendor-maintained comprehensive COTS solution that will include the CAMA and mobile assessing applications. MRS would prefer a vendor hosted SaaS solution. Ideally the system will have been implemented in numerous other taxing jurisdictions. MRS is also seeking information that will provide direction on the best way to approach modernizing its property tax systems.

1. **System Features**
2. Provide an overview of your system, including a description of major features.
3. Briefly describe how the following features are provided by your system:
   1. Valuation or CAMA features
   2. Reporting and data management
   3. Integration with third party systems for accounting, photos, GIS systems payments, billing and collection
   4. Self-service portal
   5. Security and user management
4. Does your system provide a document image repository? Does it interface with other document management systems?
5. **Vendor Support Services**
6. Describe what vendor support services the Department should consider such as infrastructure hosting services, application maintenance, etc.
7. Describe your process for migration of legacy data from prior system databases
8. Describe the level of dedicated customer resources that have been required for other implementations and for post-implementation sustainment and maintenance.
9. Describe additional vendor support services you offer.
10. **Other**

Please provide additional information that MRS should consider in seeking a solution to meet its objective.

Provide any helpful suggestions for future RFP preparation including what kind of statistics, documentation and information MRS should furnish potential bidders.

# **PART III KEY RFI EVENTS**

## Questions

**1. General Instructions**

1. It is the responsibility of each interested party to examine the entire RFI and to seek clarification, in writing, if they do not understand any information or instructions.
2. Interested parties should use **Appendix B** – Submitted Questions Form – for submission of questions.
3. The Submitted Questions Form must be submitted by e-mail and received by the RFI Coordinator, identified on the cover page of this RFI, as soon as possible but no later than the date and time specified on the RFI cover page.
4. Submitted Questions must include the RFI Number and Title in the subject line of the e-mail. The Department assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.

**2. Question & Answer Summary**

Responses to all questions will be compiled in writing and posted on the following website: <http://www.maine.gov/purchases/venbid/rfp.shtml>. It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.

## Submitting the Response

1. **Responses Due**

Responses must be received no later than the date and time listed in the timeline above.

1. **Delivery Instructions**

Responses must be submitted to the RFI Coordinator, via e-mail, listed on the cover page of this RFI document.

# **PART IV SUBMISSION REQUIREMENTS**

This section contains instructions for Respondents to use in preparing their responses. It is requested that all responses follow the outline suggested below, including the numbering, section and sub-section headings as they appear here. The Department seeks detailed yet succinct responses that demonstrate the Respondent’s experience and familiarity with the subject matter. **As this is not a competitive RFP process,** **Respondents should not provide any specific cost or customized pricing documentation in their response.**

## Response Format

**1.** For clarity, the response should be typed or printed. Responses should be single-spaced with 1” margins on white 8 ½” x 11” paper using a font no smaller than 12 point Times New Roman or similar.

**2.** All pages should be numbered consecutively beginning with number 1 on the first page of the narrative (this does not include the cover page or table of contents pages) through to the end, including all forms and attachments. For clarity, the Respondent’s name should appear on every page, including Attachments. Each Attachment should reference the section or subsection number to which it corresponds.

**3.** Respondents are asked to be brief and to respond to each question and instruction listed in the “Submission Requirements” section of this RFI. Number each response to correspond to the relevant question or instruction of the RFI.

**4.** Include any forms provided in the package or reproduce those forms as closely as possible. All information should be presented in the same order and format as described in the RFI.

**5.** Please provide all information requested in the RFI package at the time of submission.

## 

## Response Contents

## Section I. Organization

* 1. Complete **Appendix A** (provided as an Appendix to this RFI)
  2. Provide Respondent’s location(s)
  3. Provide a brief description of Respondent’s main products/services
  4. Provide a brief description of years in business
  5. Describe any licensure required for any services described in the “Information Sought” section.

## Section II. Response to Information Sought

Discuss the “Information Sought” section referenced above in Part II of this RFI and what the Respondent offers related to the goods and/or services described. Please respond to all questions in this section and give particular attention to describing the methods and resources necessary to accomplish the tasks involved. Respondents are also encouraged to share their knowledge and/or insight of the marketplace and of the specific goods and/or services in general for which information is being sought.

**Section III. Cost Information**

**MRS is NOT asking for specific cost or customized pricing documentation. Do not provide specific pricing details in your response to this RFI.**

MRS IS seeking, for budgetary planning purposes, approximate price ranges for the services sought. Describe a typical price range for similar services and products.

# **PART V REVIEW OF RESPONSES RECEIVED**

# **General Information**

# The Department will review responses received for the purpose of gathering information and market research. The Department will not score or rate responses received.

# The Department reserves the right to communicate and/or schedule interviews/presentations with Respondents, if needed, to obtain clarification of information contained in the responses received.

# **PART VI LIST OF RFI APPENDICES AND RELATED DOCUMENTS**

1. Appendix A – Response Cover Page
2. Appendix B – Submitted Questions Form

**APPENDIX A**

**STATE OF MAINE**

**Department of Administrative and Financial Services**

## RESPONSE COVER PAGE

**RFI#201808162**

**Computer-Assisted Mass Appraisal Application**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Lead Point of Contact - Name/Title:** | | |  | | |
| **Organization Name (if applicable):** | | |  | | |
| **Tel:** |  | | **Fax:** |  | |
| **E-Mail:** |  | | **Website (if applicable):** | |  |
| **Street Address:** | |  | | | |
| **City/State/Zip:** | |  | | | |

**APPENDIX B**

**State of Maine**

**Department of Administrative and Financial Services**

**SUBMITTED QUESTIONS FORM**

**RFI#201808162**

**Computer-Assisted Mass Appraisal Application**

|  |  |
| --- | --- |
| **Organization/Responder’s Name:** |  |

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| --- | --- |
| **RFI Section & Page Number** | **Question** |
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*\* If a question is not related to any section of the RFI, state “N/A” under “RFI Section & Page Number”.*

*\*\* Add additional rows, if necessary.*