



# PREMIS consulting group

Polk County, Iowa

**TAX & REAL ESTATE SYSTEM**

**RFP 159-0910**

**PRE-BID MEETING**

October 14, 2009

Prepared for:

❖ Proposing Firms

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Results Beyond Recommendations



# Agenda

1. Welcome, Introductions & Who we are
2. County Tax & Real Estate System Goals
3. Key Project Objectives
4. RFP Scope of Services
5. Evaluation & Selection Process
6. Schedule of Events
7. Wrap-up, Reminders & Next Steps
8. Question & Answer



# Introductions

## Polk County

- ❖ Anthony Jefferson: CIO, Polk County IT
- ❖ Lee Duin: Director, Office of the Treasurer
- ❖ Ron Carzoli: Tax System Manager, Office of the Auditor
- ❖ Other members of the RFP Selection team are also present today

## PREMIS Consulting Group

PREMIS Consulting Group is a neutral, unbiased consulting firm. Our business is local government. Our Sourcing Lifecycle includes ...

1. *Guidance in making appropriate sourcing decisions*
2. *Direction and assistance in RFP Development*
3. *Selection & Negotiation assistance to ensure long-term value*
4. *Assistance with the critical steps of Transition & Implementation*
5. *Design of a Governance Model to manage the relationship*



# County Tax & Real Estate System Goals

The County is seeking responses from qualified proposing firms who can ...

- ❖ Provide a commercial off-the-shelf (COTS) Real Estate and Tax System that supports the core business processes of the County Real Estate and Tax Collecting departments and its stakeholders.
- ❖ Simplify tax administration, improve data access, speed and quality, and increase compliance and collections.
- ❖ Deliver real estate and tax services to the public in an uninterrupted, timely, accurate, cost-effective and customer-focused manner.
- ❖ Increase the efficiency of county government for both internal operations, its external stakeholders and County residents.
- ❖ Dispense tax related information in a fair, accurate and efficient manner.



## KEY project objectives include ...

A business fit where the business and IT requirements are adequately met and the system is

- ▲ Configurable and flexible
- ▲ Intuitive and easy to use
- ▲ Accurate (to the penny)

A technical fit where the system

- ▲ Performs and reports as requested/expected
- ▲ Meets the System Components indentified in RFP section 3.3.1
- ▲ Is reliable and secure

Guaranteed ongoing support and enhancements from a financially viable, reliable and quality-oriented vendor

The solution will be selected by a participative cross section of County personnel who own the solution and feel responsible for ensuring its success.



# RFP Scope of Services

To replace the existing legacy mainframe (COBOL, VSAM, CICS) Real Estate & Tax System with a state-of-the-art solution that administers the following taxes in a customer-service oriented manner:

- ❖ REAL ESTATE: Tax collections of \$750 million annually, over 190,000 parcels and an approximate value of \$17.5 billion.
- ❖ SPECIAL ASSESSMENTS: \$1.5 million annually with over 8,000 active assessments with current taxes due
- ❖ MOBILE HOME: Nearly 4,200 taxable parcels and an annual collection of approximately \$370,000
- ❖ EXCISE: Collections of approximately \$24 million annually from approximately 237 parcels
- ❖ MISCELLANEOUS: Annual collections of nearly \$30.5 million from approximately 1,400 parcels

See also RFP section 3.1.2 – Background for further detail.

Project has been approved and budgeted for by the Polk County Board of Supervisors.



# Evaluation & Selection Process

<b>EVALUATION SUMMARY</b>	<b>Pts</b>
Functional Requirements	<b>250</b>
Technical Requirements	<b>150</b>
Implementation Approach	<b>200</b>
Qualifications	<b>200</b>
<b>Total TECHNICAL Points</b>	<b>800</b>
<b>Total PRICE Points</b>	<b>200</b>
<b>TOTAL POINTS</b>	<b>1000</b>



# Evaluation & Selection Process

FUNCTIONAL REQUIREMENTS	
Functional Requirements	<b>250</b>

TECHNICAL REQUIREMENTS	Pts
Software Solution ( <i>Support, Maintenance &amp; Warranty</i> )	<b>150</b>
Reporting Capabilities	
Modification & Interface Design	
Systems Architecture ( <i>Design &amp; Config</i> )	
Defect Tracking	
County Standards / Cultural Fit	

IMPLEMENTATION APPROACH	Pts
Data Conversion & Control Totals	<b>200</b>
Project Management & Quality Assurance	
Key Project Management Plans	
Change & Risk Management	
Milestones & Deliverables	
Staffing ( <i>County Real Estate &amp; Tax Experience</i> )	

QUALIFICATIONS	Pts
Vendor experience & position in industry; Reputation; Experience with projects of this size - but not necessarily county tax; commitment from corporate	<b>200</b>
References	

**A detailed description of the evaluation process can be found in chapter 5 of the RFP.**



# RFP Schedule of Events

<b>RFP Schedule</b>	
RFP Release Date	<b>September 30<sup>th</sup></b>
Last day for Questions Due	<b>October 12<sup>th</sup></b>
Pre-Proposal Conference	<b>October 14<sup>th</sup></b>
Release of Addendum – Answers to Questions	<b>October 21<sup>st</sup></b>
Technical Proposals Due (without pricing)	<b>November 24<sup>th</sup></b>
Addendum – Demonstration Script & Instructions	<b>December 1<sup>st</sup></b>
Pricing Proposals Due	<b>December 8<sup>th</sup></b>
Down Select #1 / Announce to proposing firms	<b>December 15<sup>th</sup></b>
Oral Presentations and Demonstrations	<b>January 4<sup>th</sup> - 8<sup>th</sup></b>
Down Select #2 / Announce to proposing firms	<b>January 27<sup>th</sup></b>
BAFO and Contract Negotiations	<b>TBD</b>
County Approval	<b>TBD</b>
Contract Initiation	<b>TBD</b>



# Wrap-up, Reminders & Next Steps

## WRAP-UP ...

We encourage everyone to propose their best solution

- ❖ There is no favorite in this process
- ❖ A great deal of planning and preparation has gone into creating a thorough procurement process that provides for a level playing field

## REMINDERS ...

- ❖ Monitor websites for addendums and updates
- ❖ Make sure you have all materials – RFP + 3 appendix documents
- ❖ Sample Contract will be published after round 1 down-select
- ❖ Orals/Demonstration prep – Addendum release December 1<sup>st</sup>

## KEY NEXT STEPS ...

- |                                   |                           |
|-----------------------------------|---------------------------|
| ❖ Addendum – Answers to Questions | October 21 <sup>st</sup>  |
| ❖ Technical Proposals Due         | November 24 <sup>th</sup> |
| ❖ Pricing Proposals Due           | December 8 <sup>th</sup>  |



# Question & Answer Period ...

# Questions?