REQUEST FOR PROPOSALS

Property Tax & Billing System Replacement Project

for
Vigo County, Indiana

Issued: July 24, 2006

REQUEST FOR PROPOSALS (RFP)

The Vigo County, Indiana Commissioners request proposals from qualified Proposers for

Property Tax and Billing System Replacement Project
for
Vigo County, Indiana

PROPOSAL

Vigo County understands Proposers may have questions that cannot be answered by the information contained within the RFP. All questions should be submitted by 4:00 P.M. local time on Wednesday, August 2, 2006. Questions may be submitted via email to mark.nieman@vigocounty.org or via fax to (812) 231-0091 (attention: Kylissa Miller).

A Pre-Proposal Conference is scheduled for Monday, August 14, 2006, at 10:00 A. M. local time in the Council Chambers of the Vigo County Annex Building located at:
131 Oak Street
Terre Haute, IN 47807

PROPOSAL SUBMITTAL DEADLINE:
Wednesday, August 30, 2006

All proposals must be delivered by 12:00 noon local time.

Vigo County reserves the right to reject any or all proposals.

NO LATE PROPOSALS WILL BE ACCEPTED FOR ANY REASON WHATSOEVER

Submit sealed proposals to:

Jim Bramble
Vigo County Auditor
131 Oak Street
Terre Haute, IN 47807

PACKAGES MUST BE PROPERLY LABELED PER THE INSTRUCTIONS HEREIN AND STATE CLEARLY THAT THE ENCLOSED PROPOSAL IS FOR:

Property Tax and Billing System Replacement Project
Vigo County, Indiana (RFP)

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1. Executive Summary

The Auditor of Vigo County, Indiana, working in collaboration with the Treasurer, Assessor, County Commissioners, County Council, and other key stakeholders, hopes to implement a new property tax and billing system. The project was initiated by property tax and billing system stakeholders, who recognize existing technologies and processes need to be significantly improved. The current system is antiquated and does not allow for compliance with state software requirements. These newly published software requirements are published on the State of Indiana, Department of Local Government Finance (DLGF) website:

http://www.in.gov/dlgf/laws/Statewide%20System%20-%20Gov%20approved.pdf

The project objective is to assist Vigo County in moving towards compliance with the new state standards and statutes related to property tax and billing. A new system is expected to save tax dollars and improve service within the numerous Vigo County agencies collectively responsible for property tax administration.

Vigo County's current property tax and billing computer system was implemented in the mid-1980s. Since then, tax processing requirements and technology have changed considerably. Today, Vigo County's property tax and billing system is a patchwork of systems and manual steps. No software vendor supports the system, and virtually all technical knowledge is shared by only a few individuals. In addition, there is no technical documentation. Moreover, the current solution delivers only minimal functionality to help ensure accuracy and operational efficiency. Just as important, the current technical solution does not meet minimum State requirements and essentially has no opportunity to meet these requirements. It is imperative that a new system be flexible and will accommodate changes with DLGF standards.

Finally, the current technology delivers poor service to citizens. Basic functionality like searching by an address or creating reports cannot be performed, ultimately affecting customer service. There is no integration with the current CAMA system or the GIS system. There is no availability of information on the internet related to property tax and billing. Basic expectations of taxpayers are not being met.

2. Challenges and Objectives

a. Current Challenges

Vigo County requests proposals from vendors who can help them more effectively manage the property tax and billing process. Vigo County's property tax and billing system stakeholders recognize existing technologies and processes can be significantly improved. Specific drivers behind the initiative include a general perception by Vigo County officials that:

- The existing property tax and billing system is outdated and difficult to utilize;
- The existing system is not flexible and impedes compliance with legislative requirements, specifically meeting the demands of 50 IAC 23;
- The existing system is very costly to maintain and enhance;
- There are increasing technical risks with continued use of the current system;
- Improved online services are needed – e.g., GIS integration
- Tighter integration is becoming more essential – e.g., CAMA and tax;
- Adopting new technologies will bring significant new operational efficiencies; and
- Vigo County should lead within the context of broader statewide efforts to improve property tax administration.

b. New System: Objectives

Vigo County's next generation property tax and billing system must address these challenges. More broadly, the next system will need to further the interests of all system stakeholders by:

- Helping ensure that tax dollars are used efficiently and not wasted on obsolete, inefficient systems and business processes;
- Providing the highest levels of customer service;
- Assisting Vigo County in moving towards compliance with state standards and statutes, including the demands of 50 IAC 23;
- Ensuring the system is more user friendly, flexible, and can accommodate ongoing changes with DLGF standards;
- Allowing for easier integration with other applications and systems;
- Increasing public access to services by providing reliable communications and an information infrastructure with multiple access points;
- Saving the customer time by providing systems and service alternatives to visiting Vigo County facilities;
- Increasing responsiveness to commercial requests for information and services;
- Allowing managers to focus on improved business processes to reduce the cost of government and permitting the allocation of savings for reinvestment in new or existing programs;

- Allowing Vigo County to focus on its core competencies and business priorities;
- Providing timely information for executive decision-making through the implementation of modern enterprise-wide systems; and
- Increasing the pool of technology resources and capabilities by:
  - Aligning service goals and technology capabilities
  - Enabling statutory compliance
  - Improving existing service delivery
  - Enhancing e-government services
  - Having the ability to integrate the property tax and billing system with the CAMA system and Geographic Information Systems (GIS).

c. General System and Service Requirements

Property tax and billing system users and constituents require convenient and timely access to information. Because custom application development is time-consuming, risky, and labor-intensive, Vigo County desires a commercial-off-the-shelf (COTS) software solution. In order to ensure the highest level of efficiency, quality and cost-effectiveness, Vigo County also desires execution of industry-standard IT practices.

Vendors will need to address how the newly published DLGF standards will impact their software and the County's ability to comply with these standards. The vendor must also explain how the software will conform to these standards and how any necessary costs will be covered (e.g., software or maintenance fees). Vendors will also need to understand and comply with test and production environment provisions and procedures, including confirming capacity within environment and compatibility with existing systems, databases and/or desktops.

d. Future Architecture Requirements

Many commercial property tax and billing management packages will address the issues identified in the enclosed functional requirements sections (located in Appendices A and B). In addition to evaluating a vendor's ability to address these requirements, a future system will need to:

- **Run on either a MS-SQL or Oracle database.** Vigo County primarily uses MS-SQL, but could handle Oracle as well.
- **Run on a standard Windows server operating system.**
- **Work with multiple desktop operating systems,** including Windows 2000 and Windows XP.
- **Support interaction with the standard Microsoft Office 2000 Suite desktop software package.**
- **Support some type of a graphical user interface**, rather than character based only. A web client (thin client) interface will generally be preferred to a client-server (thick client) interface. Web clients allow for much easier support and upgrade for IT, as well as easier access to the software from home or field locations.
- **Support varying levels of Security** (i.e view, edit, update, screen, field level).
- **Allow for online processing of transactions for various departments**. Transactions may include e-filing and payments.
- **Provide extract capability for electronic files** (including standard, built-in extracts to meet DLGF file layout requirements).
- **Allow real-time access to historical data**.

- **Deliver acceptable system uptime performance** (i.e., backup and maintenance Impact on system availability must be minimal).
- **Provide acceptable processing speeds** (e.g., for calculating taxes or printing a bill).
- **Deliver ongoing compliance with changes in legislation/state mandates**.
- **Provide the ability for system administrators to expunge** records, indexes, images, etc.
- **Provide training & documentation**.

e. High Level Process Redesign Opportunities

Over the course of RFP development, stakeholders indicated what might be done differently, from a process perspective, to improve service. Some of these ideas are included here in the hope a new property tax and billing system can be leveraged to facilitate adoption of one or more of these process redesign opportunities.

- **Standardize addresses across the county.** Different standards exist for entering addresses into the many systems in Vigo County. By creating a standard address format, information from various systems will be easier to query, search and match.
- **Integrate CAMA and property tax and billing system.** Currently, the CAMA and property tax and billing system are not interfaced. Integrating these systems would significantly reduce duplicate data entry and assist with data quality and integrity.
- **Integrate GIS and property tax and billing system.** The CAMA system will soon be integrated with the county GIS system through the web. Integrating the CAMA, GIS, and the tax and billing system would provide maximum data quality and increase distribution and availability of information.
- **Implement county wide security standards.** There is an opportunity to implement security standards prior to the implementation of the new system to ensure data integrity and protection.

3. Selection Events and Instructions

a. Project Timeline

Vigo County has established the following tentative timeline for the administration of this project. These dates are subject to amendment at Vigo County's discretion.

RFP Released	July 24, 2006
Written Questions Due	August 2, 2006 (4:00 PM Local Time)
Pre-Proposal Conference	August 14, 2006
Proposals Due	August 30, 2006 (12:00 noon Local Time)
Finalists Proposal Presentations	September 11, 2006 (week of) *
Vendor Selected	September 22, 2006 *
Vendor Approved	September 29, 2006 *
Negotiations	October 9, 2006 (week of) *
Contract Finalized	October 13, 2006 *

(* *These dates are subject to change based on resource limitations, the need for further discussions with vendors, and other factors.)*

b. Written Questions

Any specific questions or comments concerning this RFP may be presented orally during the *Pre-Proposal Conference* or may be submitted in writing. Written questions should be submitted no_later than 4:00 P.M. local time on Wednesday, August 2, 2006 by fax to the attention of Kyllssa Miller at (812) 231-0091. Questions may also be submitted by email to mark.nieman@vigocounty.org. Questions or comments received after this time may or may not be entertained. No phone calls please.

Proposers are expected to raise any questions or concerns they have concerning the document at this point in the process. If a Proposer discovers any significant errors, ambiguity, conflict, omission or other deficiency in the RFP, the Proposer should request modification/clarification. This includes any questions or concerns surrounding the specifications, Vigo County environment, administrative process or general RFP terms.

Vigo County will decide which questions will be answered, including whether any formal amendment or clarification to the RFP is warranted. Vigo County will e-mail a list of questions and the official answers to the Proposers. Proposers shall note that only the *written* answers provided will be binding on Vigo County. These answers shall represent Vigo County's official position and supersede any previous oral statements made during the conference or at any time by Vigo County staff.

Please include the following information when submitting questions:

- Heading: Property Tax and Billing System Replacement Project
- A description of your question(s)

- Your contact information (name, company, mailing address, phone number, fax number, email address)

c. Pre-Proposal Conference

A Pre-Proposal Conference for prospect bidders will be held to address any questions that providers have surrounding the RFP. The Proposer's attendance at this conference will be considered optional, but highly advised. The conference will be held on Monday August 14, 2006, at 10:00 AM local time at the following location:

Council Chambers
Vigo County Annex Building
131 Oak Street
Terre Haute, IN 47807

Please call Kylissa Miller at (812) 462-3361 in advance, if special accommodations are needed due to a disability.

Proposer contact regarding this RFP (prior to due date) with any person employed by Vigo County, or in any way other than through the communication channels referenced above, may be grounds for rejection of the proposal.

d. Proposal Submission Instructions

i) Format and General Requirements

Proposals should be organized, formatted and submitted in the following manner.

- All information is to be properly executed and must be submitted in a sealed envelope or package. The Proposer should submit ten (10) hard copy originals and two (2) CD-ROMs to include each of the four (4) sections (Proposer's Background and Financial Information, Technical, Cost and Vendor Response to Critical System Requirements). Details about each section are outlined below in ***"iii. Proposal Sections."*** Please include the Vendor Response Form responses on the softcopy CD-ROM. For an electronic copy of the form, please email mark.nieman@vigocounty.org.
- Hard copy proposals should be submitted on standard 8 1/2" x 11" paper, and should be presented in a professional manner such as spiral bound, perfect bound, or professional grade folder/three ring binder. Proposals should be labeled appropriately on the front cover to include the RFP name, company name and the proposal due date. Foldouts that contain charts, spreadsheets, and oversize exhibits are permissible.
- Tabs or other separators should serve to divide the four major sections of the proposal. Manuals and other reference documentation may be bound separately and included in the applicable package or envelope.
- All responses, as well as any reference material presented, must be written in the English language. Main text should be a common typeface (Arial, Times New Roman, etc.) and should not be smaller than 11 pt.
- Proposals shall be based only on the material contained in the RFP. In addition to this main document, this includes written responses to questions as well as any other official amendments or addenda published by Vigo County concerning the acquisition.

- Each envelope/package shall be clearly labeled with the Proposer's name, and "Property Tax and Billing System Replacement Project for Vigo County, Indiana - Due Date: August 30, 2006."
- An officer of the Proposer that can bind company with signature authority must sign (execute) the proposal on the transmittal letter.
- Any confidential financial or trade secret information, as permitted by Indiana law, must be marked as such. Cost/pricing information will not be confidential.
- A **bid security <u>must</u> be included** with your proposal package. Details on the bid security are outlined in ***"Section 5: Additional Provisions, I. Security."***

ii) Instructions

All proposals must be received and time stamped by the deadline, 12:00 noon on August 30, 2006. Vigo County will not consider any proposals received after the official deadline. Vigo County will not make any exceptions due to failure or delay of the U.S. Postal Service or any other delivery service, and Proposers are strongly encouraged to take any steps necessary to ensure that the proposal is received on time. Proposals should be submitted to:

Jim Bramble
Vigo County Auditor
Vigo County Annex Building
131 Oak Street
Terre Haute, Indiana 47807

iii) Sections

The proposal should be organized into the following four (4) sections, and contain, at a minimum, the information outlined below.

1) Proposer's Background and Financial Information

- ***a. Transmittal Letter:*** The Proposer shall submit a formal transmittal letter on *official company letterhead* that contains the following information:
    - Statement of Interest: This statement should indicate the company's general interest and capability to perform the project. It should also include a brief summary of any information that might be especially important to Vigo County.
    - Statement of Proposal Life: The proposal must have a proposal life of at least one hundred eighty (180) days from the date of the RFP due date. This shall represent the minimum timeframe during which the proposal is a firm offer.
    - Contact Person: Please include the name, title, address, telephone number, fax number and e-mail (if available) of the key contact person for any questions regarding your proposal.
    - Signature of Authorized Representative: An Officer of the Proposer must sign the proposal. This individual must be authorized to commit the proposing corporation for purposes of this proposal.

- ***b. Company Background:*** This section should provide a brief overview of the company and provide the following information:
    - Company name and local business address (Include any regional offices and/or headquarters, foreign or domestic.)
    - Year established (Include former names and year established, if applicable)
    - Type of ownership and parent company, if applicable; and
    - Any general pre-printed literature regarding your company that you deem appropriate
- ***c. Company Financial Information:*** This section should include financial information about the company, including at a minimum:
    - Complete, audited, financial statements for the most recent three (3) years. Statements should be signed by an officer of the firm.
    - The most recent 10-K and 10-Q reports filed with the U.S. Securities and Exchange Commission, if required by law.
    - Recent reports published by one or more credit rating services relating to the outstanding debt, if any.
    - Pending litigation, state regulatory, or federal regulatory actions that may have a material impact on the financial condition of the prime contractor that is not otherwise disclosed in the above financial information.
- ***d. Proposer History:*** The Proposer should be a "responsible" Proposer that is both ethically and financially in good standing within the industry, as determined by Vigo County. If the Proposer has had a contract terminated for default during the past three (3) years, or has been the subject of any governmental securities investigation during the past three (3) years, or has had clients discontinue services in the last three (3) years, this fact should be disclosed in the RFP response along with the Proposer's position on the matter(s). If the Proposer has experienced no such terminations for default in the past three years, then it should so indicate.

- ***e. References and Experience:*** Please submit three (3) references from the last three (3) years, noting any that are government clients. These must be for property tax and billing product implementations. Please include the following:
    - Client Name
    - Contract Title/Contract Reference Number
    - Primary Contact, Title and Telephone Number
    - Contract Dates
    - Contract Amount
    - Type of Contract (Public/Private Sector)
    - Length of Relationship with Client
    - Description of innovative solutions implemented to meet needs similar to the requirements in this RFP
- ***f. Staff Resumes:*** Please submit resumes of qualified staff that will be would deliver the services described in Section 4: Tasks and Deliverables. Staff should have experience developing and/or implementing the proposed property tax and billing product.

- ***g. Subcontractor Information:*** If a joint venture or subcontracts are contemplated, provide the same information as above (Section 1, a-f) for any subcontractors, and explain their role in the contract. The prime contractor must assume all responsibility for the work, including the work of any subcontractors. Vigo County has the right to limited any or all work performed by subcontractors or refuse collaboration with subcontractors.

2) Technical Section

The technical section should address each item presented in the RFP in accordance with the directions found herein. The response may be a discussion type response to the item or an answer to one or more questions or bullets, and may at times involve an in-depth narrative response, which may include charts, tables or illustrations. Please be certain to address all relevant and requested information. Answers should be clear, sufficiently detailed and specific to Vigo County. In cases where questions and bullets are answered, please restate the specific question or bullet with the answer directly below, referencing any numbering or lettering scheme used in applicable section of the RFP. In this section, the following, minimum information, should be addressed:

- **Overall Approach.** Identify how you will address each section of the approach outlined in section ***"4: Tasks and Deliverables"***. Include any standard project management and software development and/or implementation methodologies employed by your company as well as technical/architectural diagrams as needed. Include a high-level project plan in your response, with an assumed project start date of November 1, 2006 and a go-live date of March 15, 2007.

- **Software Scalability.** Identify history or capability with implementations that scale to and beyond Vigo County's current parcel base. Please provide details (contract, contact, entity, parcels, etc.). Vigo County current parcels in Property are:

Type	Parcel Count	Net Tax
Real Estate	67,364	$62,124,850
Personal Property	21,922	$18,875,860
Mobile Homes	7,476	$ 146,739
Total	96,762	$81,147,449

- **Software Flexibility and Capability.** A new property tax and billing system must have the flexibility and capability to meet ever-changing state rules and statutes. Title VI of the Indiana State Code includes those statutes that Vigo County must currently operate under. Title VI may be found at: http://www.in.gov/legislative/ic/code/title6. In addition, the new property tax and billing system must meet the requirements outlined 50 IAC 23. Please provide a summary of how these specific State Codes and rules can be adhered to using the Proposer's recommended solution(s). If applicable, provide additional details by describing the environment, modules, product offerings, routines, configurations and or customizations that would be required. Please include the details in this section of the proposal and clearly identify Title VI of the Indiana State Code and 50 IAC 23. **Also, please include those portions of Title VI of the State Code and Rule (50 IAC 23) that will not be accommodated for by the software.**

3) Cost Section

In this section, include all price documentation and materials. Please break down costs by the following categories: Data Conversion, Customization, Software Cost, Licensing, Software Maintenance Cost, Travel and Expense, Implementation and Training, Optional Modules (e.g., tax sale, GIS Integration), and Other (define other). Costs must be clearly identified and itemized. Any licensing, incidental or related costs should also be included.

- **Pricing Structure.** The Proposer must provide a competitive offer of pricing that provides the software and support services as described in this RFP. The pricing should include all labor, licensing, software, and materials to deliver the services as specified in the RFP. The Proposer assumes all liability for any omissions.

- The Proposer must breakdown the price for each service (i.e., Data Conversion, Customization, Software Cost, Licensing, Software Maintenance Cost, Travel and Expense, Implementation and Training, Optional Modules (e.g., tax sale, GIS Integration), and Other (define other) as described in this RFP. All pricing must be clearly identified and include all necessary costs for a specific requirement or the system as a whole to be met. A total price for the system (as a whole) must also be included.

- All assumptions upon which the pricing is predicated must be clearly identified and explained.

- Any supplemental hardware or software needs must be clearly identified in the pricing proposal.

- Any duties, leasing fees, and or other charges must be identified in the pricing proposal and shown separately from charges for the services.

- If alternative solutions are proposed (e.g., different functional requirement packages, implementation times, etc.), a supplemental pricing sheet should be completed in detail for each alternative.

4) Vendor Response to Critical System Requirements

Included in Appendix B are the critical system requirements. In this section, respond to all requirements listed in Appendix B, following the instructions located in Appendix C. For an electronic copy of the form, please email mark.nieman@vigocounty.org.

4. Tasks and Deliverables

This section details the specific tasks and deliverables that the Proposer will be required to perform during the project. The following table summarizes the tasks and associated deliverables detailed in this section.

Task	Task Description	Deliverables
Task 1	Manage the Project (Section 4.a)	
Task 2	Attend Status Meetings (Section 4.b)	1. Weekly Status Reports
Task 3	Maintain Work Plan (Section 4.c)	1. Updated Work Plans
Task 4	Install and Certify Base Software (Section 4.d)	1. Installed Base Software 2. Certified Output from Installation Test Plans
Task 5	Customization Review (Section 4.e)	1. Customization Response (includes Program Specifications) 2. Work Plan for Software Customization 3. Fixed price cost proposal for software customizations
Task 6	Modify and Install Customized Software (Section 4.f)	1. Customized Software 2. Customized Installation Test Plan
Task 7	Interface Assistance (Section 4.g)	1. Fixed price cost proposal for software modifications and/or services related to interface requirements.
Task 8	Integration Assistance (Section 4.h)	1. Fixed price cost proposal for software modifications and/or services related to integration requirements.
Task 9	Conversion Assistance (Section 4.i)	1. Fixed price cost proposal for software modifications and/or services related to conversion requirements.
Task 10	Conduct tests (Section 4.j)	1. Test plan 2. Completed testing
Task 11	Setup permanent test environment (Section 4.k)	1. Test environment
Task 12	Provide and Update Documentation (Section 4.l)	1. Base COTS Product Documentation 2. Customized COTS Product Documentation 3. Documentation of County-Specific Changes
Task 13	Provide Training (Section 4.m)	1. Training Plan 2. Customized COTS Product Technical/Operational Training 3. Customized COTS Product Functional Training 4. Customized COTS Product Training Materials
Task 14	Implementation Assistance (Section 4.n)	1. Fixed price cost proposal for software modifications and/or services related to implementation requirements, including onsite support for go-live date.

a. Manage the Project

The success of this project depends on a strong project management approach. To this end, the project will be managed on a day-to-day basis by a project management team composed of a Proposer Project Manager and Vigo County Project Manager. Unless specified otherwise, deliverables and reports associated with the project will be delivered to the Vigo County Project Manager. The project management team will be responsible for the review and acceptance of the deliverables and reports after approval by the Department Directors. The project management team will work with the successful Proposer to set a schedule for deliverables and an acceptable review and comment period. The successful Proposer will provide a recommended approach to managing routine project correspondence. The project management team will report to the Data Board, County Council and County Commissioners.

b. Attend Status Meetings

The successful Proposer(s) may be required to meet on a weekly basis with the Vigo County project management team. Meetings may be either on-site or via telephone, as determined by the Vigo County Project Manager. The weekly meetings are an opportunity to review progress and to take corrective action when required. The Proposer should propose a detailed plan for addressing this requirement. The successful Proposer(s) may be required, on occasion, to make presentations to the Data Board or the County Council.

c. Maintain Work Plan

Upon contract award, the project management team will review the project schedule with the successful Proposer(s). The work plan will be reviewed and revised as necessary. A detailed and updated work plan is the first deliverable. In the proposal, present a high-level project plan with an anticipated project start date of November 1, 2006 and a go-live date for the new system on March 15, 2007.

d. Install and Certify Base Software

The successful Proposer will install the base software and associated source code as proposed without modification to the Vigo County environment. The successful Proposer shall test the base software and demonstrate that required functionality from the RFP requirements checklist is met. The deliverable from this task will be the successful installation of the base software and requirements validation. The successful Proposer will review the installation and testing procedures with the project management team. The successful Proposer will also deliver technical and user documentation associated with the software. The successful Proposer will provide Vigo County the rights to secure a soft copy of the user and technical documentation and to make an unlimited number of copies of the documentation for Vigo County's internal use.

e. Customization Review

Vigo County is interesting in acquiring a COTS package(s) requiring minimal customization. Customization may be required, however, to implement business functions that are either legally mandated or are required by Vigo County. Vigo County recognizes, however, that new requirements may arise during the course of the project based on changes in legislation or some other event. In some cases, Vigo County will implement the necessary solution. For example, Vigo County staff may develop reports. In other cases, however, Vigo County may choose to contract with the successful Proposer(s) for additional modifications on a fixed price basis (corresponding to Appendix B requirements), if not covered by vendor due to legislative requirements.

- The project management team will conduct an on-site, customization review in conjunction with the successful Proposer(s).

- Successful Proposer(s) will be required to prepare a written disposition addressing each requirement that requires customization (as identified from Vendor Response Form). The response must include:
    - A description of how the customization requirement will be met
    - Impact of the change on the base software (i.e., inclusion of the change in future general releases)
    - Impact of the change on future maintenance releases
    - A mechanism for isolating and identifying any Vigo County specific modifications in order to facilitate re-application of the modifications in the future
    - Program specifications (Vigo County must approve the format of the design document)
    - A test plan that can be used to validate successful implementation of the customization task. The preparation of a test plan during the design phase is a critical task and a key part of the deliverable
- Upon completion of the customization review, Vigo County may, at its sole discretion, choose not to implement some of the modifications proposed in the fixed price solution. Vigo County expects a credit for these hours which may be used for new requirements as the project progresses.

There are two deliverables from the Customization Review task:

- The first deliverable of this task will be a document containing the successful Proposer(s) response to each of the customization requirements as identified from the Vendor Response Form. The successful Proposer(s) will be responsible for conducting on-site design reviews (walkthroughs) for the purpose of validating proposed modifications. The project management team will track each response, noting which are approved and which need additional effort. This deliverable will be considered complete when the project management team has reviewed and approved the successful Proposer(s) response in total.
- The second deliverable is an integrated work plan, prepared by the successful Proposer(s), for implementing the base and customization requirements. The work plan will be considered complete when it is approved by the project management team and after it has been incorporated in the overall project plan.

f. Modify And Install Customized Software

Upon receiving approval from Vigo County, the successful Proposer(s) will modify the base software in accordance with the program specifications and the approved work plan. The successful Proposer(s) will be responsible for making the changes and ensuring their successful installation at Vigo County.

The deliverable from this task will be the tested and validated customized base software plus the installation test plan modified to reflect customization. The task will be considered complete when the project management team has accepted all the modifications.

g. Interface Assistance

Vigo County and/or its designee will be principally responsible for the systems interface effort, with the Proposer providing recommendations, support, and assistance as required. The successful Proposer(s) will be required to provide information in the form and format required by other application systems. **See Appendix D, Property tax and billing system Integration and Interfaces** for more details. The successful Proposer(s) will not be required to modify existing Vigo County applications. Vigo County will contract with the successful Proposer(s) on a fixed price basis for modifications and/or assistance required by an interface requirement necessitated by the customization of the Proposer(s) software.

h. Integration Assistance

The Proposer will be principally responsible for any systems integration effort that may be required. See **Appendix D, Property tax and billing system Integration and Interfaces** for more details. The successful Proposer(s) will be required to provide information in the form and format required by other application systems required for integration. The Proposer will provide recommendations, support, and assistance as required. This may involve, for example, the development of front-end programs that interface with the various COTS packages.

i. Conversion Assistance

The conversion environment is detailed in **Appendix D** of this RFP. The successful Proposer(s) will be responsible for defining the level of conversion support by describing specific tasks, developing programs, and furnishing technical information necessary to convert production data from the legacy systems to the new system. **Appendix D, Data Conversion** provides additional information regarding the conversion of historical data.

j. Conduct Tests

Vigo County requires that testing be an integrated part of the entire implementation life cycle. Testing is not an activity that occurs the day or week prior to production cut-over. The following considerations and responsibilities apply.

i. **Installation Test**: The successful Proposer(s) must validate successful installation of the base software product by demonstrating that required functional specifications have been met.

ii. **Test Plan**: Each set of modifications assigned to be developed by the successful Proposer(s) must be accompanied by a test plan prepared by the successful Proposer(s). The test plan must identify the means by which the correct operation of the modifications can be validated. Program specifications will not be accepted by Vigo County unless accompanied by a test plan.

iii. **Unit Testing**: The successful Proposer(s) will make changes to the base software in accordance with the project management team's approved program specifications and test procedures. The successful Proposer(s) will test programs and ensure that they function in accordance with the test criteria. Upon successful unit testing, the successful Proposer(s) will retain the test results and provide a copy to the project management team.

iv. **System Test**: The successful Proposer(s) will be responsible for system testing. The system test will validate the correct operation of a set of modifications to the COTS product. It will also verify that there were no unanticipated side effects to the system. In performing a system test, the successful Proposer(s) must exercise the installation test plan as modified. Records of the system test must be retained and a copy provided to the project management team.

v. **Acceptance Test**: A proposed acceptance test plan must be submitted with the proposal. A final acceptance test plan will be prepared by the project management team. The final acceptance test will be conducted prior to production cut-over and in accordance with the test plan. The final acceptance test will exercise all functionality, interfaces, and integration components. To this end, the new system will be loaded with actual data from the legacy systems.

Failure of successful Proposer to satisfactorily address problems arising during the final acceptance test in the specified period will result in withholding of final payment to the successful Proposer. Acceptance of the new system will be at the sole discretion of Vigo County.

vi. **Problem Resolution**: The Proposer must place the highest priority on the identification and resolution of any problems which occur within their product, with contractor's personnel, or with the integration or interfacing of their product with those of other vendors. Problem resolution is considered part of the original contract price or part of a subsequently negotiated customization price. Vigo County shall not reimburse the successful Proposer for any costs associated with problem resolution.

k. Setup Permanent Test Environment

In addition to the testing described above, Vigo County desires a permanent test environment to use for ongoing development, training and user acceptance testing as appropriate.

l. Provide and Update Documentation

The successful Proposer must provide, at a minimum, three (3) types of written documentation:

- COTS Product Technical Documentation
- COTS Product Operation Documentation
- COTS Product User Documentation

COTS Product Technical Documentation should describe the technical architecture of the COTS product. The technical documentation should include information regarding the relational database design, record or table layouts, data dictionary, performance specifications, hardware specifications, program description, etc. In other words, the technical documentation, in conjunction with the Technical/Operational Training, should provide sufficient information to enable County technical staff to maintain the system, develop custom programs and reports, and change the programs when necessary.

COTS Product Operation Documentation should describe the steps and procedures needed to operate the COTS product on a day-to-day basis. It should include information relating to system start-up and shut down procedures, backup and restore procedures, batch job submission procedures, security procedures, table maintenance procedures, etc.

COTS Product User Documentation must describe the operation of the COTS products from the perspective of the end user. The documentation should cover sign on and sign off sequences, menu operation, screen descriptions, means of invoking on-line help facilities, and so on. The County will be responsible for developing procedures manuals for its internal use.

The COTS product may change as the result of customization, integration, and interface efforts. The successful Proposer will be responsible for updating the COTS product documentation accordingly. This documentation includes not only the minimum types described above, but on-line help, on-line manuals, quick reference guides, and any other standard documentation provided with the base product. In preparing the documentation changes, the successful Proposer must identify and ensure that any Vigo County-specific changes are properly annotated to facilitate re-application when the next release of the documentation is distributed. The effort related to customization of documentation is expected to be included with the total cost for any software modification performed. The deliverable from this task is the modified documentation and a document identifying Vigo County specific documentation sections. The successful Proposer is not required to maintain Vigo County-specific documentation indefinitely.

m. Provide Training

The successful Proposer will be responsible for two types of training: COTS Product Technical/Operational Training and COTS Product Functional Training. The deliverables related to this task include:

- A training plan approved by the project management team
- COTS Product Technical/Operational Training for the base product and customized product
- COTS Product Functional Training for the base product and customized product
- Training materials for the base product and customized product (number of copies to be coordinated with the County)

n. Implementation Assistance

The successful Proposer(s) will provide Vigo County on-site implementation assistance. Implementation assistance will be composed of, but not limited to, the following activities:

i. Project Manager

ii. Control Table Maintenance: The successful Proposer will load all control tables (e.g., property characteristic codes, etc.) and instruct the County on table maintenance.

iii. Security: The successful Proposer will provide assistance in defining security requirements and establishing security table rules that implement the requirements. The successful Proposer will help insure that the confidentiality of taxpayer information is preserved while, at the same time, insuring that Vigo County staff is authorized to perform necessary system tasks.

iv. Technical Support: The successful Proposer will work with the project management team during the project and in particular, the first few weeks of conversion and live operation. It is expected that the Proposer will be onsite during, and in the few days, following the go-live date. It is critical that day-to-day operations be reviewed very closely. System performance problems must be identified and resolved. The successful Proposer will help suggest various ways to adjust system parameters for improved performance.

These activities are related to the product implementation at Vigo County and are distinct from the successful Proposer’s services provided through the ongoing support and maintenance program.

5. Additional Provisions

Vigo County may modify or amend this RFP at any time. If it becomes necessary for Vigo County to revise any part of this RFP, the revision(s) will be provided to all Proposers known to be in receipt of the original RFP. In such an event, the submission deadline may be extended at the option of Vigo County, to allow Proposers the opportunity to revise their proposals accordingly.

a. Use, Disclosure, and Confidentiality of Information

The information supplied by a Proposer as part of an RFP response will become the property of Vigo County. Proposals will be available to interested parties in accordance with the Indiana Access to Public Records Act IC 5-14-3, and IC 5-22-9-5. None of the proposal responses will be made available to the public until after award and execution of a contract by the Vigo County Commissioners, or cancellation of the procurement, all in accordance with said Act.

To the extent requested by a Proposer and allowed by law, Vigo County will treat trade secrets and confidential financial information as confidential (if designated as confidential and submitted separately in a sealed envelope). The Proposer must request confidential status before the proposals are opened. If Vigo County believes that information designated as confidential should not be treated as such, the Proposer will be notified and afforded reasonable time to present objections prior to any release of the information. Vigo County will take into consideration the possibility of harm resulting from any disclosure, but reserves the right to make the final determination in accordance with the law. Pricing information will not be considered confidential.

b. Errors in Proposals

Vigo County reserves the right to correct obvious errors such as arithmetic, typographical, or transposition errors during the evaluation. Such corrections must be approved by the Vigo County Auditor's Office and countersigned by the Proposer. Proposers are advised to make sure that their proposals are true and correct at the time of submission.

c. Proposer Expenses

By submitting a response to this RFP or participating in the process, each Proposer agrees that all of its related expenses are its sole responsibility, and that Vigo County will not be responsible for any costs whatsoever incurred by the Proposer in connection with or resulting from the RFP process, including but not limited to costs for preparation/submission of proposals, travel and per diem, attending interviews, providing presentations or demonstrations, and participating in contract negotiation sessions. Nor shall such costs or expenses subsequently be absorbed in the event that Proposer is awarded a contract for performance of any or all of the services.

d. Proposal Life

Proposers must hold their proposals open and pricing firm for at least one hundred eighty (180) calendar days from the proposal submission deadline. Any proposal accepted by Vigo County for the purpose of contract negotiations shall remain valid until superseded by an executed contract or until rejected by Vigo County.

e. Possession and Review

During the evaluation period and prior to award, possession of the proposals and accompanying information is limited to the RFP Evaluation Team, the Vigo County Auditor's Office, the Vigo County Treasurer's Office, the Vigo County Assessor's Office, the Vigo County Data Processing Office, the Vigo County Data Board, Attorneys, Consultants and any other appropriate Vigo County officials and staff. Proposers who attempt to gain this privileged information or to influence the evaluation process (i.e., assist in evaluation) will be in violation of purchasing rules and their offer will not be evaluated or considered.

f. Post-Proposal Discussions

After the proposal due date, Vigo County may conduct discussions with representatives of one or more firms submitting proposals for the purpose of clarification of a company's proposal and/or to ensure full understanding of, and responsiveness to, the solicitation requirements.

The commencement of discussions or the scheduling of presentations does not signify a commitment by Vigo County to execute an agreement or to continue discussions with the Proposer.

g. Contract Negotiations

Vigo County will use the requirements set forth herein as the basis for proposal evaluations. Upon identifying one or more responsible Proposers (appearing to be most advantageous), Vigo County may enter into contract negotiations with one or more Proposer. If at any time contract negotiations with a Proposer are believed to be ineffective, Vigo County may cease all activities with the Proposer and, if necessary, begin or continue, contract negotiation and preparation activities with another Proposer, and the process may continue until a contract is executed. As part of evaluation process, Vigo County may entertain "best and final offers" from one or more firms. Vigo County reserves the right to cease contract negotiation activities at any time and reject all proposals if such action is determined by Vigo County to be in its best interest.

h. Contract Renewal

A resulting contract may be renewed beyond the expiration date by mutual agreement of the parties. The term or terms of the renewal may not be longer than the term of the original contract. A renewal shall consist of written notice sent by either party and written acceptance by the other. All other terms and conditions of the contract shall remain the same as set forth herein, and may be amended only by written instrument signed by both Vigo County and Contractor and attached as an amendment.

i. Multiple Awards

Vigo County may award a contract to a single Proposer; or, at its option, may award contracts to multiple Proposers if deemed to be in the best interest of Vigo County.

j. No Obligation to Proceed

Vigo County is under no obligation to proceed with this project or any subsequent project, and may cancel this RFP at any time without the substitution of another, if such cancellation is deemed in the best interest of Vigo County. Furthermore, Vigo County may reject any and all proposals, to waive any irregularities or informalities in a proposal, and to issue a new or modified RFP, if it is found to be in the best interest of Vigo County.

k. Proposal Withdrawal and Modification

Vigo County may allow a Proposer representative bearing proper authorization and identification to sign for, receive, and withdraw the Proposer's unopened proposal prior to submission deadline. A Proposer wishing to modify its proposal may do so by withdrawing the initial submission and then submitting a modified proposal prior to the deadline.

l. Security

You Must Submit a Bid Security with Your Proposal. All proposals will require a bid bond or certified check in an amount equal to 10% of the base cost of your proposal plus any optional alternatives. The bid security should cover the highest sum of all alternative pricing scenarios, if submitting more than one cost option. All bids not accompanied by a bid bond or a certified check payable to Vigo County, Indiana will be rejected as non-responsive.

Proposers wishing the return of a bid security should include a self-addressed stamped envelope with their Proposal. The requested document will be returned as soon as possible upon successfully entering into contract negotiations with a selected vendor. Bonds not claimed may be destroyed upon successful selection of a vendor.

You May be Required to Submit a Performance Bond During Contract Negotiations. In the event that Vigo County enters into final contract negotiations with Proposer, Vigo County reserves the right to require Proposer to provide a performance bond up to 100% of the contract amount to satisfy any direct damages to Vigo County, Indiana resulting from Proposer's failure or refusal to engage in good faith negotiations or honor the terms of its proposal or contract. The bond must remain in effect for the duration of the contract.

Proposers wishing the return of a performance bond should include a self-addressed stamped envelope. The requested document will be returned as soon as possible upon successful completion of the contract. Bonds not claimed may be destroyed upon successful completion of the contract.

m. Subcontractors

Vigo County intends to contract with one or more prime contractors who will be solely responsible for contractual performance. In the event the prime contractor utilizes one or more subcontractors, the prime contractor will assume all responsibility for performance of services by the subcontractor(s). Additionally, Vigo County must be named as a third party beneficiary in all subcontracts. A list of all subcontractors proposed to take part in the performance of the contract (at its outset) shall be provided to Vigo County for approval prior to contract execution. This request may require that sufficient financial or background information be provided. To the degree available, this information should be included in an appendix with the proposal response. Vigo County reserves the right to limit or reject any and all subcontractors.

n. Taxes

Vigo County is exempt from Federal, State, and Local Taxes and will not be responsible for any such taxes in connection with the award or performance of this contract.

o. Licenses and Permits

The successful Provider shall furnish Vigo County upon request any and all documentation regarding necessary licenses, permits, certifications and/or registrations required by the laws and regulations of Vigo County, other units of local government, the State of Indiana and the United States. The Provider certifies that it is now and will remain in good standing with such governmental agencies and that it will keep its licenses, permits, certifications and/or registrations in force during the term of the agreement.

p. Use of Vigo County's Name

Upon entering an agreement, the successful contractor agrees not to use the name of Vigo County in relation to the agreement in commercial advertising, trade literature or press releases without the prior written approval of Vigo County.

q. Incorporated by Reference

This Request for Proposal (RFP) distributed by Vigo County, including any other required terms, will be incorporated by reference and made a part of any resulting contract, except that any material approved by the County as confidential will not be publicly disclosed.

r. Law and Venue

Any and all actions or proceedings arising out of, or related to, this RFP shall be brought only in an appropriate federal or state court in the State of Indiana, and submission of a proposal by the Proposer constitutes consent to the jurisdiction of such courts over Proposer and the subject matter of such actions or proceedings.

6. RFP Rating and Evaluation Process

This section presents the process and the criteria for selection that Vigo County will follow in evaluating proposals submitted by potential providers in response to this RFP. The selection process includes a pre-proposal conference, question and answer sets, a multi-step review and a scored evaluation of final proposals.

a. Receipt of Proposals

Final proposals must be delivered to the Vigo County procurement official and at the time and place specified in Section "***3. Selection Events and Instructions"***. Final proposals must be in the quantity and format specified in the RFP instructions. Final proposals may be rejected as non-responsive if not under sealed cover and received by August 30 at 12:00 PM (noon) local time.

b. Vigo County Evaluation Team

Vigo County will establish an evaluation team comprised of individuals selected from elected officials, Vigo County management and staff that will be responsible for the review and evaluation of proposals. Vigo County may engage additional subject matter experts or consultants during the evaluation process to assist the evaluation team in gaining a better understanding of technical, financial, legal, contractual, project, or program issues. These additional subject matter experts will not have voting privileges or responsibility for the evaluation process.

c. Proposal Evaluation

The proposal evaluation will consist of four (4) major steps. First, all proposals will be screened to determine if the Proposer has complied with appropriate administrative requirements and submittal instructions. Second, all proposals will be evaluated and scored for experience and qualifications. This second step serves as a qualification step, with only those deemed qualified proceeding to the remaining steps. Third, each qualified Proposer's solution will be comprehensively evaluated and scored for completeness, functionality, timeline, architecture and price, as indicated below. The proposal evaluation criteria and process are described in this section. The fourth step is the selection of a provider(s). Each of these steps is described in further detail below.

As part of the evaluation process, each qualified Proposer may be required to participate in an interview and/or presentation. The purpose of the interview is to meet key members of the Proposer's team and discuss the solution and related experience. As part of the interview, the Proposer will be required to deliver a presentation to the evaluation team. Further information (agenda, dates) regarding the interview will be provided to qualified Proposers at least three (3) working days prior to the interview date.

i. Step 1 – Proposal Screening

The first step in the evaluation consists of screening each proposal for compliance with various content requirements, administrative requirements, and operational requirements defined in the RFP.

- ***Proposal Opening and Content Validation Check (pass/fail)***

  The evaluation team will review each proposal for the presence of the proper number of proposal copies and required information in conformance with the requirements of this RFP. Absence of the required number of copies or required information may result in the proposal being deemed non-responsive and rejected. These requirements are found in "Section *3. Selection Events and Instructions."*

- ***Administrative Requirements Review (pass/fail)***

  The evaluation team will review the proposal to determine whether it meets all administrative requirements contained Section 3 (*Selection Events and Instructions*) of this RFP. The team will also determine if the Proposer has provided the required explanations to specific administrative requirements. If a proposal fails materially to meet an administrative requirement, it may be considered non-responsive and rejected. If all of the administrative requirements have been met, the evaluation team will then continue with the remaining evaluation steps.

- ***Operational Requirements Response Review (pass/fail)***

  The evaluation team will review each proposal to determine whether the proposal contains permissible responses to all of the requirements contained in this RFP. If a proposal lacks a permissible response to any requirement, it may be considered non-responsive and rejected.

ii. Step 2 – Evaluation of Provider Experience and Staff Qualifications

The second step in the proposal evaluation consists of the evaluation and scoring of each Proposer's relevant experience and staff qualifications to perform the work defined. Awarding of points will be based on consensus of the evaluation team. The evaluation of the Proposer's experience and staff qualifications includes two components, each weighted equally: Provider viability and experience assessment and project team organization and staffing assessment. Upon completion of this step, Proposers receiving the top scores will be qualified to proceed to the remaining steps.

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- ***Viability and Experience Assessment***

  To assess viability, the evaluation team will review financial and other information provided in the response. To assess experience, the Proposer must provide at least three (3) references.

- ***Project Team Organization and Staffing Assessment***

  Vigo County will review and evaluate the project team and organization proposed for this project. Scoring of the Proposer's response to each of the project team organization and staffing requirements of the RFP will be based on the consensus of the evaluation team.

iii. Step 3 – Evaluation of Proposed Solution

Each member of the evaluation team will score each proposed solution by working with the team to complete a Vendor Scoring Sheet (below). As indicated on the sheet, those Proposers receiving the highest scores for will be selected as finalists, and thus be considered during the Evaluation Phase.

CATEGORY	WEIGHT						CATEGORY SCORE (1-5)*	WEIGHTED SCORE
Functionality	**0.4**							
		Functional Area	# Must Haves	Factor	***Functional Area Score (1-5)****	***Functional Area Weighted Score***		
		General Functionality	29	0.24		0		
		Reporting	20	0.16		0		
		TIF Management	10	0.08		0		
		Deductions and Exemptions	25	0.20		0		
		Payment and Settlement	40	0.32		0		
		TOTAL	**124**			0		
Price	**0.3**							
Timeline	**0.1**							
Architecture	**0.1**							
Compliance to DLGF Standards (Title VI of IN State Code and 50 IAC 23)	**0.1**							
TOTAL**								

Notes:

* indicates evaluators' input

** Every Evaluation Team member's total will be added together to arrive at a composite score for each vendor. The vendors with the highest composite scores will be selected as finalists for the Evaluation Phase.

iv. Step 4 – Selection of Providers

The evaluation team will determine which proposals have the highest combined scores for all evaluation factors, and invite those proposers to participate in an interview and/or presentation. These Proposers will be declared the “finalists” and pending final presentations, a selection decision could be made.

APPENDICES

Appendix A : General Business Requirements

This section discusses, by functional area, the functionality Vigo County's tax and billing software is expected to possess, as well as a number of limitations recognized in the current applications. A list of business requirements corresponding to each functional area is located in **Appendix B** of this document and replicated in the Vendor Response Form (available in electronic format by emailing mark.nieman@vigocounty.org).

Vendors are asked to provide details to Vigo County related to their solution's satisfaction of each requirement in accordance with the instructions provided in Appendix C.

a. General Functionality

To assist Vigo County in moving towards compliance with state software standards, some standards outlined in 50 IAC 23 are included as general functionality requirements. Other requirements to meet 50 IAC 23 are presented in appropriate functional areas below. The current system is antiquated and does not meet current statewide standards, let alone have the ability to meet future requirements. This area addresses the standards and other general functions that the new software needs to accommodate.

For business requirements corresponding to this functional area, see "General Functionality" section, Appendix B.

b. Reporting

Another important function of the property tax and billing system is the reporting and analysis functions to allow the user to review the massive amounts of data in the system. Vigo County's Property Tax and Billing system does not contain sufficient reporting options, especially in terms of data quality examinations. Data errors can seriously impact not only taxpayers' bills, but also cause shortfalls in government units. Also, the current system doesn't allow for the creation of custom queries and reports by users. Reporting capabilities must minimally include the capability to perform analysis and calculations. It must provide:

- Standard reports
- Query capabilities
- Custom report creation
- Viewing, saving, and printing capabilities
- Ad-hoc reporting requirements
- Data extract capability

For business requirements corresponding to this functional area, see "Reporting" section, Appendix B.

c. TIF Management

The Auditor is responsible for entering data for each taxing unit which has established a tax increment financing (TIF) allocation area.

For business requirements corresponding to this functional area, see "TIF Management" section, Appendix B.

d. Deductions and Exemptions

Once the assessments are set by the County Assessor and the amount of assessment for each real property parcel is transferred to the County Auditor from the CAMA system, the Auditor and County Treasurer have significant information and data management needs to enter deductions, exemptions, and abatements; accurately bill taxpayers; collect tax payments and distribute the money collected in the correct amounts to the correct taxing fund of each governmental unit in the county. Simply stated, tax and billing software is developed to carry out the above functions for its users – the County Auditor's office and the County Treasurer's office.

The information posted and maintained by the Auditor is not merely a post-assessment process. In fact, the Auditor is entering data throughout the year based on the various deadlines for activities for deductions, exemptions, abatements, units establishing TIF allocation areas, and other matters. Once CAMA rolls then the Auditor finalizes the exemptions and deductions process.

- **Deductions**
  First, the Auditor is responsible for accepting deduction filings and applying them to a taxpayer's account if he or she is eligible. Therefore, tax systems must include a method for this information to be entered, calculated, and applied to the recipient account. One requirement is the calculation and application of abatements. Real property abatements are approved at the local level; personal property tax abatements are approved by the Indiana Department of Local Government Finance (DLGF). Tax systems must include modules that store abatement schedules and retain specific information regarding a particular property's abatement such as starting year, number of years, and year the abatement is currently in. Another example is application of the homestead deduction. Application of this deduction requires the residential and non-residential assessed values supplied by the assessor system and to calculate the deduction amount. Although this function seems straightforward on the surface, sometimes paper form filings accumulate before data is entered. Moreover, the current tax and billing system does not allow users to enter filings for the next tax year if the office is still working in the current year. Therefore, piles of forms accumulate until the system allows these to be entered.

- **Budgets**
  From the governmental side of the Auditor's responsibility, independent of the assessment function, the County Auditor receives copies of the budgets of each unit of government in the county to be transmitted to the Department of Local Government Finance (DLGF). The DLGF compiles and reviews these budgets and finalizes the levy to be made for each fund.

- **Certification of Net Assessed Valuation**
  The County Auditor uses the assessment information from the County Assessor and the exemption, deduction and abatement information in the property tax and billing system (info collected in an MS-Excel spreadsheet) to compile the net assessed valuation (NAV) by taxing district. (Please note: the values are not current because of the inability to enter values in real-time. The County Auditor must use prior year billed information to compensate for the lack of this data.)

  Once the Auditor has compiled the NAV by taxing district, it is certified to the DLGF and all applicable local units of government. The Auditor's certification must be broken down among real property, business personal property, non-business personal property, bank personal property, homestead qualified property, and captured NAV for tax increment financing areas (TIFs). The DLGF uses the certificate of NAV and the Certified Levy for each fund of each unit of government in the County to calculate the tax rate for each fund and the Property Tax Replacement Credit (PTRC), Business Personal Property PTRC, and

Homestead Credit. These rates are provided to the County Auditor, who then data enters rates into the tax and billing system.

One significant limitation with the above functionality is the transfer of values and rates is primarily done on spreadsheets by email. The manual transfer of information, even with the assistance of electronically transferred spreadsheets, is highly error prone and a duplication of effort. Data entered rates must be checked and re-checked.

For business requirements corresponding to this functional area, see "Deductions and Exemptions" section, Appendix B.

e. Payment and Settlement

The Auditor enters all of the assessment data (including deductions, exemptions and abatements) into an Abstract by taxing district. The Auditor enters the gross tax rate, PTRC, Business Personal Property PTRC and Homestead Credit, and calculates the actual levy that will be generated for each fund by the tax rate (the Abstract Levy). The Auditor adds in prior taxes outstanding, corrections to assessed values since certification to the DLGF, penalties and interest, and other information. Once the Abstract is complete, the Auditor sends the Abstract to the Auditor of State for approval. Similar break-out functions are performed on TIF base and increment values as well.

Once approved, billing can be made by the County Treasurer. The Treasurer collects payments, applies credits, informs the Auditor of any errors or necessary corrections and provides the information to the Auditor to track for settlement and distribution to the units of government. The Auditor's settlement to the units of government must be specific by fund for each unit in order to track whether the unit has collected in excess of its Certified Levy for Levy Excess purposes.

In addition, this information is constantly changing due to late filed personal property tax returns, results of appeals (positive or negative) and corrections to assessments, abatements, deductions, exemptions and other information including bankruptcies. The County Auditor makes pre- and post-Abstract adjustments to various data and information prior to final settlement to the units of government. Refunds and post-settlement adjustments occur even after everything is "final."

In sum, the Auditor and Treasurer functions simultaneously allocate the tax to be collected for each fund of each unit into a total tax rate to be applied to each taxpayer in each taxing district (less PTRC, Business Personal Property PTRC and Homestead). They bill all taxpayers, collect what is paid, then break it back down (adding back in the state-paid funds) and allocate how much should be paid to each fund of each unit of government based on how much was collected on a pro-rata basis within each taxing district.

Although the process is managed by using the current system, the system in place is not flexible. It does not contain sufficient internal reporting and data integrity checking that can assist users throughout these steps.

For business requirements corresponding to this functional area, see "Payment and Settlement" section, Appendix B.

As referenced earlier, Vigo County operates under Title VI of the Indiana State Code.
A new Property tax and billing system must provide the capability (without constant customization) to adhere to those codes.

Appendix B : Functional Requirements

Critical System Requirements Table of Contents

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ID	Functional Group	Business Scenario	Must Have	Required for DLGF Cert?	Can Request Be Satisified?	Exists "Out of the Box" Today?	If No, When and What Planned Released?	Customization Required?
General Functionality								
1	General	Ability for a user with appropriate security level to perform basic modifications to a record	X	Yes				
2	General	Includes basic features for online screens (i.e. ability to navigate and select screens, ability to window and scroll screens, jumping from screen to screen without having to parcel number or tax id number)	X	Yes				
3	General	Includes an online, context-sensitive tutorial suitable for use by new operators	X	Yes				
4	General	Ability to calculate property tax rates	X	Yes				
5	General	Ability to record all data required to prepare the certified statement of net assessed value	X	Yes				
6	General	Ability to record all data required to prepare the tax duplicate	X	Yes				
7	General	Ability to record all data required to prepare the Abstract of property, assessments, taxes, deductions, and exemptions	X	Yes				
8	General	Ability to record all data required to prepare statements of taxes and assessments	X	Yes				
9	General	Ability to record all data required to prepare a provisional tax statement and a corresponding reconciling statement	X	Yes				
10	General	Ability to record adjustments made for specific reasons	X	Yes				
11	General	Ability to calculate penalties	X	Yes				

General Functionality								
12	General	Ability to maintain and make available for electronic retrieval historical and future year data	X	Yes				
13	General	Ability to capture and properly maintain basic user data after the addition, update, or deletion of a record	X	Yes				
14	General	Includes basic features to ensure data integrity (i.e. system should prevent the addition, modification, or removal of assessed value and tax data in the current or past year unless through a correction of error)	X	Yes				
15	General	Includes a security system to ensure computer system and data security, including access controls to the system as a whole and appropriate levels of control based on required access to database functions	X	Yes				
16	General	Informs users when records meet certain criteria (i.e certain records such as appeals and tax sales should contain indicators that informs users that the property is classified as an appeal or tax sale)	X	Yes				
17	General	Ability to track who made changes and when changes were made (audit trail)	X					
18	General	Ability to read bar codes and scan at the front counter to automatically display statement on the screen						
19	General	Public field where any offices can leave a private access memo to provide background and facilitate inter-office communication	X					
20	General	Public comment area where message can be written for members of the public to view	X					
21	General	Ability to store a property address and a correspondence address (e.g., billing address)	X					
22	General	Color code information on the screen to indicate what office is responsible for various information						
23	General	Ability for all offices and taxpayer to electronically view status of appeals process and refunds						

General Functionality								
24	General	Electronic viewing and/or transmission of documents						
25	General	Filing documents online (i.e., deductions, exemptions, appeals)						
26	Data Conversion	Ability to convert data from a Unisys mainframe	X					
27	Auditor	For online applications, once eligibility is determined will automatically grab appropriate information and perform calculation (e.g., for exemptions)	X					
28	Auditor	Override capabilities for exemptions and deductions	X					
29	Auditor	Flag report to ensure taxpayers receive no more than one homestead deduction						
30	Auditor	Exemptions for not-for-profits: message generated to Auditor informing that certain exemptions were approved, and seeking Auditor's final implementation						
31	Auditor	Exemptions for not-for-profits: once Auditor implements, automatic message generated to Twp. Assessors and Auditor						
32	Auditor	Ability to manage splits with conservancy or TIF disctricts	X					
33	Treasurer	Ability to dictate where a tax bill can be sent (e.g., send to out-of-state home or temporary address)	X					
34	Treasurer	Ability to change tax bill address or correspondence address	X					
35	Treasurer	Two-person verification feature (employee and supervisor) for Treasurer Corrections	X					

General Functionality								
36	Treasurer	Ability to create electronic file in lieu of printing current tax bill for processing of payments	X					
37	Treasurer	Taxpayer can receive, view, and print tax information online	X					
Reporting								
1	Data Entry and Access	Ability to enter data that is out of cycle (e.g., ability to enter Pay 2007 data during Pay 2006)	X					
2	Data Entry and Access	Ability to access data in real-time	X	Yes				
3	Data Entry and Access	Ability to setup standards for data entry and the system validates whether it is appropriate	X					
4	Query Data	Ability for all users to query information by defining parameters	X	Yes				
5	Report Access	Ability to access reports at a point in time	X					
6	Report Access	Ability for authorized personnel within the Treasurer's and Auditor's Office to access and print a duplicate tax bill at a specific point in time	X					
7	Report Access	Ability to import/export data between county system and the state system	X					
8	Report Access	Ability to run "test" reports on groups of properties to determine impact of changes (analyzer function)	X					
9	Report Access	Ability to print labels from the property system						

Reporting									
10	Report Access	Ability to integrate all state reports in order for electronic transmittal required by the State	X						
11	Report Access	Ability to print reports from system at each office	X	Yes					
12	Report Access	Ability to email reports from system	X						
13	Report Access	Ability to save reports to a computer from the system	X	Yes					
14	Report Access	Ability to view a report on the system	X						
15	Report Access	Ability to export information from the system	X						
16	Report Access	Integrated report writing tool (i.e., ability for users to extract data)	X						
17	Report Access	Includes certain features to facilitate continued access to particular user-defined reports	X	Yes					
18	Report Access	Ability for reports to be available on demand to county auditor and county treasurer staff or designated officials within other county offices	X	Yes					
19	Generate Reports	Ability to generate and display user-defined reports, including the following for summary statistics (sum, county, mean, median, difference, product, ratio, variance, and percentage)	X	Yes					
20	Generate Reports	Meets minimum requirements for the display of user-defined reports	X	Yes					
21	Generate Reports	Ability to generate historical reports and transaction logs (user-defined starting/ending dates and times)	X	Yes					

TIF Management								
1	TIF Management	Ability to access certified TIF data at any point in time	X	Yes				
2	TIF Management	Ability to track historical and new data on system for the TIF parcels	X	Yes				
3	TIF Management	Ability to track funding of replacement credit for base and increment	X					
4	TIF Management	Ability to calculate the fund(s) breakdown between the base and increment in detail for the tax calculate and distribution to units						
5	TIF Management	Ability to enter and track TIF base and increment in real time and for point in time analysis						
6	TIF Management	Ability for Auditor to enter/modify parcels/schedules for TIF	X					
7	TIF Management	Ability to interface TIF module with GIS						
8	TIF Management	Ability to comment the TIF fields with notes on changes	X					
9	TIF Management	Ability to tie TIF resolutions to multiple taxing district						
10	TIF Management	Ability to define TIFs as multiple property types	X					
11	TIF Management	Ability to analyze TIF for both point in time and current working data						
12	TIF Management	Ability to define a TIF (township number, parcel number, property type)						

TIF Management									
13	TIF Management	Ability to track TIF terms	X						
14	TIF Management	Ability to change TIF terms	X						
15	TIF Management	Ability to enter information and work on the segment for the next payable year	X						
16	TIF Management	Ability to flag and notify when changes are made in a TIF district							
17	TIF Management	Ability to track revisions (e.g., who make the revision and when)	X						
18	TIF Management	Ability to auto split the base for cut outs							
19	TIF Management	Ability to store all TIF calculations, payments, unpaids, ACs, additionals and assessed value history (total amount, split between the base and increment)							
20	TIF Management	Ability to report on all TIF using stored data indicated in item #19(do not re-create calculations in the report)							
Deductions and Exemptions									
1	General Deductions	Ability to submit an application online	X						
2	General Deductions	Ability to generate an email to taxpayer to confirm online application submission has been received	X						
3	General Deductions	Ability to generate an email to taxpayer for online application submission once it has been approved	X						
4	General Deductions	Ability to print veterans certificates for excise tax	X						

Deductions and Exemptions								
5	General Deductions	Ability to track veterans eligibility for excise tax exemption	X					
6	General Deductions	Ability to split exemptions between parcels	X					
7	General Deductions	Ability to flag deductions for final approval	X					
8	General Deductions	Ability to identify and flag multiple deductions for the same taxpayer/owner (for homestead)	X					
9	General Deductions	Ability to keep track of data (deductions) for prior payable years	X					
10	General Deductions	Ability to enter data in live/real time for any current or future payable year	X					
11	General Deductions	Ability to scan paper forms and store in system (document management)						
12	General Deductions	Ability to post deductions in the following order: Homestead, mortgage, over 65, blind or disabled, partially disabled veteran and totally disabled veteran	X	Yes				
13	General Deductions	Ability to interface with state system to determine if real property is place of primary residence						
14	General Deductions	Ability for secure system so only Auditor may add, delete or change as needed; all others have view access	X					
15	General Deductions	Ability to separately identify the type and amount of all deductions, exemptions, and credits	X	Yes				
16	General Deductions	Ability to apply economic revitalization area deductions	X	Yes				
17	General Deductions	Ability to apply investment deductions	X	Yes				

Deductions and Exemptions								
18	General Deductions	Ability to utilize state assessed distributable property data provided by the department for tax calculation	X	Yes				
19	General Deductions	Ability to accept assessed value for land and improvements that is separated into homestead-eligible and homestead-ineligible components	X	Yes				
20	Tax Exempt	Ability to verify person owned property by file deadline	X					
21	Online Filing	Ability to auto verify/validate parcel number for online submissions						
22	Tax Exempt	Ability to track and log exemption decision (grant, partial grant, deny)	X					
23	Tax Exempt	Ability for exemptions to automatically update if the AV is adjusted through correction of error	X	Yes				
24	Tax Exempt	Ability to submit one application online to support multiple parcels	X					
25	Abatements	Ability to track abatement schedule on system and run reports	X					
26	Abatements	Ability to modify abatement schedule and ability to modify due to reassessment (correction of errors)	X					
27	Abatements	Ability to track CF-1 in property system	X					
28	Abatements	Ability to specify which improvements are tied to which abatement	X					

Payment and Settlement								
1	General	Ability to generate all necessary reports to support the tax billing, settlement, and collections process. (This includes an extensive array of reporting requirements for all agencies, and bidding vendors will want to collaborate with persons in each agency.)	X	Yes				
2	Tax Calculate	Ability to track advance taxpayer payments in the system	X					
3	Tax Calculate	Ability to see any charges related to a parcel on one screen (spring, fall, conservancy)	X					
4	Prep for Tax Bills	Ability to make modifications to tax bill (change wording on bill, HB 1001 as example)	X	Yes				
5	Prep for Tax Bills	Ability to print hardcopies of tax bills	X					
6	Prep for Tax Bills	Ability to develop an electronic file of tax bills	X					
7	Prep for Tax Bills	Ability to track and bill to a billing address (instead of a property assessment address)	X					
8	Prep for Tax Bills	Ability to verify and address (e.g., Code 1 software requirements) at the time the data is entered into the system						
9	Prep for Tax Bills	Ability to identify who is billed and how (e.g., current TSD - tax statement distribution codes, mailing codes) and send notification to taxpayers	X					
11	Tax Bill Payment	Ability to pay bills online	X					
12	Tax Bill Sent	Ability to transfer files to and from the system (e.g., from banks and mortgage companies)	X					
13	Payments	Ability to search payment information in real-time (cash history)	X					

Payment and Settlement									
14	Payments	Ability to apply a single payment to multiple bills	X						
15	Payments	Ability to apply multiple payments to a single bill	X						
16	Payments	Ability to track credit card payments (print and track by township)	X						
17	Payments	Ability to track check payments (print and track by township)	X						
18	Payments	Ability to track cash payments (print and track by township)	X						
19	Payments	Ability to load data file from lockbox and other financial institutions onto system with a quality control component	X						
20	Payments	Ability for all offices to flag a taxpayer for multiple bad checks	X						
21	Payments	Ability to electronically track and enter special assessments to tax bills	X						
22	Payments	Ability for authorized personnel within Treasurer's office to access and print a duplicate tax bill at a specific point in time	X						
23	Payments	Ability to manually override payment posting sequence	X						
24	Payments	Ability to direct a payment to or from an advance	X						
25	Payments	Ability to modify payments within current collection cycle (i.e., move/remove within or to other parcels)	X						
26	Payments	Ability to generate advance/excess payment report	X						

Payment and Settlement								
27	Payments	Ability to update tax bills based on change of deductions and exemptions	X					
28	Payments	Ability to generate history for delinquent payments	X	Yes				
29	Payments	Ability to capture delinquent personal property data required for inclusion in a written demand served upon taxpayer	X	Yes				
30	Payments	Ability to extract batch summary reports	X					
31	Payments	Ability to exclude penalties on special codes (i.e., payment plans)	X					
32	Payments	Ability to track who made the payment (e.g., taxpayer, mortgage company)	X					
33	Balance Collections	Ability to generate a daily batch report for Treasurer cashiers to use to balance	X					
34	Balance Collections	Ability to report cycles activity individually and collectively	X					
35	Settlement	Ability to generate state forms	X					
36	Settlement	Ability to validate DLGF data in property system (all variables of the budget order)	X					
37	Settlement	Ability to identify surplus payments so it won't be certified						
38	Settlement	Ability to issue surplus workbook and database, and ability to generate letters	X					
39	Money Distribution	Ability to generate Form 22s by taxing unit	X					

Payment and Settlement								
40	Money Distribution	Ability to track fund disbursement and special assessment by taxing unit	X	Yes				
41	Refunds	Ability to generate reports for surplus and property tax refunds	X					
42	Refunds	Ability to manage refunds process in system	X	Yes				

Appendix C: Instructions to Vendor for Vendor Response Form

General Instructions:

Vendors should respond to the requirements listed in Appendix B. Vendors should request an electronic copy of the Vendor Response Form by emailing mark.nieman@vigocounty.org.

There are four (4) possible scenarios to respond to an individual requirement. An example of each scenario is exhibited and explained below.

Completed Vendor Response Forms should be included in the proposal (hardcopy and electronic), and submitted as described in Section ***"3: Selection Events and Instructions"***.

All responses must adhere to the instructions presented herein. Any variance from the requested response format might disqualify a vendor from further consideration.

Questions Explained:

- **"Can Request be Satisfied?"**
  - **Translation:** *Is your proposed solution able to satisfy this requirement in all material respects?*
  - **Acceptable Responses: Yes or No**
- **"Standard Functionality Exists 'Out of Box' Today?"**
  - **Translation:** *Can your proposed solution satisfy this requirement in all material respects without customization?*
  - **Acceptable Responses: Yes or No**
- **"If No (does not exist "out of box today"), When and What Planned Release?"**
  - **Translation:** *If the requirement is not available "Out of the Box" today but it is planned to be made available as part of a future "Out of the Box" release, respond to when it will be available and note the version of your standard application.*
  - **Acceptable Responses: N/A or date and version number**
- **Customization Required?**
  - **Translation:** *Will customization be required in order for your solution to satisfy this requirement in all material respects?*
  - **Acceptable Responses: Yes or No**
    - **IMPORTANT NOTE: Vendors responding affirmatively to this question for a given requirement *must* provide further details regarding the required customization in accordance with details provided in the RFP.**

Example:

Four scenarios are displayed in the table below. Vendor X has responded differently to each requirement to demonstrate each possible scenario that a vendor might provide per requirement.

- **Scenario #1:** Response indicates that Vendor X *can* satisfy Requirement #1, and currently offers that functionality in its standard application.
- **Scenario #2:** Response indicates that Vendor X *can* satisfy Requirement #1, but does *not* currently offer that functionality in its standard application. Rather, the requirement *will* be included in Release # 3.11, which will be available in September 2006.
- **Scenario #3:** Response indicates that Vendor X *can* satisfy Requirement #2, but does *not* currently offer that functionality in its standard application. Also, Vendor X does *not* plan on releasing a version of its standard application which includes that functionality. Rather, the requirement *must* be satisfied through a custom solution.
- **Scenario #4:** Response indicates that Vendor X *cannot* satisfy Requirement #4.

ID	Functional Group	Business Scenario	Must Have	Required for DLGF Cert?	Can Request Be Satisfied ?	Exists "Out of the Box" Today ?	If No, When and What Planned Released ?	Customization Required?
General Functionality								
1	General	Ability for a user with appropriate security level to perform basic modifications to a record	X	Yes	Yes	Yes	N/A	No
2	General	Includes basic features for online screens (i.e. ability to navigate and select screens, ability to window and scroll screens, jumping from screen to screen without having to parcel number or tax id number)	X	Yes	Yes	No	Release 3.11; 9/1/2006	No
3	General	Includes an online, context-sensitive tutorial suitable for use by new operators	X	Yes	Yes	No	N/A	Yes
4	General	Ability to calculate property tax rates	X	Yes	No	No	N/A	No

Appendix D: Technology Environment & Considerations

a. General Description of Service Environment

Vigo County has a heterogeneous applications and systems environment. Many of the key Vigo County applications are legacy mainframe systems characterized by limited functionality relative to newer software, and maintenance/support challenges. Legacy applications require knowledge in COBOL and Unisys. For these systems, there is a strong desire to transition from the mainframe to a web-based and/or client-server environment.

MS-SQL is Vigo County's standard database management system. Applications and databases in MS Access are used by individuals and small groups throughout the enterprise. The IT/Data Processing department develops reports using Crystal Reports.

The infrastructure for the Vigo County network consists of fifteen MS Windows 2000/2003 Servers. Specific applications are being run on dedicated servers.

b. Overview of Current Property Tax and Billing Environment

The core property tax and billing computer system used in Vigo County was implemented in the mid-1980s using then-current mainframe technology. Since then, the system has been patched and augmented by many customizations and add-on programs and files in order to continue to meet changing, minimum system requirements. The original solution has grown into a truly unique and complex computer system. This ongoing patchwork approach has obviously gotten Vigo County through many years of taxation – much more than originally intended.

However, the technical hardware and software solution in place for Vigo County has reached a point where continued use is putting the entire county's property tax processing at high risk. The solution also delivers only minimal functionality to help ensure accuracy and efficiency in processing for the county. The current technical solution does not meet the minimum requirements of the State and has no chance to meet these requirements. In some cases, basic functionality like creating custom queries and reports cannot be performed. In most cases, any minor change request, such as for new legislative requirements, costs significant time and money.

The large number of technical risks, constraints, and costs are creating some of the greatest pressures for Vigo County to move off of 1980s computing technology and into a solution that meets today's basic requirements. The system should also be flexible to accommodate the ongoing changes of state standards and statutes related to property tax and billing. Users and officials broadly recognize the inefficiencies and barriers to better taxpayer service caused by the current technology constraints. The following sections describe some of the issues in the current technical environment and some of the requirements needed in a new system.

c. Other Considerations

- **Degree of Configurability.** Vigo County would prefer a property tax and billing system that is highly configurable and minimally (if at all) customized. Adding or changing field names, screens, workflows, and databases usually require extensive customization. We desire a table driven system that would reduce the need for customization. Additional parcel or tax characteristics must be defined and used without the need for system programming.

- **Data Conversion.** Most of the data for the existing systems is stored in a Unisys mainframe, although some data is stored in MS-Access databases. Vigo County feels there are two approaches to address this data and our data conversion needs. One option will be for the Proposer to define the level of support to be provided in converting historical tax data. This conversion support option must describe specific services to be provided and a plan for developing conversion programs. The conversion plan must clearly identify any tasks and costs which are to be the responsibility of Vigo County. The Proposer will be required to have a strong understanding of the Unisys mainframe. The second option will be for Vigo County to perform most of the conversion tasks. Given the current legacy system's historical duration (15+ years), old Unisys format and numerous iterations of change, the conversion could be for Vigo County's IT/Data Processing Department to write the extracts for the major databases. (Vigo County personnel know the ins and outs of the data, and would place them into a file format that the Proposer and Vigo County could import into the new system. The Proposer would need to work with Vigo County to facilitate the mapping of data into the new system.

  Given the constraints of the existing system, the Auditor, Assessors, and Treasurer have created many excel tables and some Access databases. Depending on what options and features are available and purchased from a vendor, it would be difficult to estimate the effort to convert these Access databases. Given the potential that many of these databases may not have to be converted, some of this will depend on what options the new Property Tax and Billing System will have.

  We ask the Proposer's to consider best practices for offering a solution to our conversion needs. This would include pricing and/ or mapping and import/export tools. Please include details in technical section and pricing breakdown in the cost section.

  We understand a new system may require fields that our current system does not contain or fields that will not convert.

- **Potential Integration with Other Systems**
  We ask interested Proposer's to offer solutions for our Integration/Interface needs. Please include details in the technical and cost section of response to this RFP (in a clearly identified sub-section for each integration/interface).

  - **CAMA System**
    Vigo County's currently uses Manatron's ProVal Plus for the CAMA system. While not a requirement, the Proposer may respond to the possibility of interfacing the proposed tax and billing system with the County's current CAMA system. If responding to this section, include a proposed approach and relevant pricing associated with such integration. This should be an optional component.

  - **GIS System**
    Vigo County is currently implementing a GIS solution that will be integrated with the CAMA system. The GIS system is running on ESRI's ArcIMS 9.0 platform, a server side product which enables the publishing of maps and data to the web. GIS data is maintained as feature classes in an ArcSDE database, which sits on top of MS SQL Server. While not a requirement, the Proposer may respond to the possibility of interfacing the proposed tax and billing system with the County's current GIS system. **Any proposed integration should be a MS SQL Server based solution**. If responding to this section, include a proposed approach and relevant pricing associated with such integration. This should be an optional component.

- **Additional System Module**
  - **Tax Sale**
    The Vigo County Auditor's Office is currently using Synergistic Resources Integration (SRI) for the majority of the tasks involved with Tax Sales. However, if the Proposer has a module to facilitate the management of the tax sale process, please provide details concerning this optional module, including implementation approach in the technical section and pricing information in the cost section. This information should be included in a clearly identified sub-section for each.