



City-County IT Commission

City of Wausau Assessment Department

RESPONSE DUE:

October 11, 2016

Request for Proposal

of Computer Assisted Mass Appraisal (CAMA) Software

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PROJECT COORDINATOR:

Julie Henrichs

City County IT

407 Grant Street

Wausau, WI 54403

Office: 715-261-6704

E-mail: Julie.Henrichs@co.marathon.wi.us

A. Purpose of Request

The City of Wausau (City), who receives IT services from the City-County Information Technology Commission (CCITC), is requesting proposals for the purpose of obtaining a Computer Assisted Mass Appraisal (CAMA) software system and related implementation services to replace the City of Wausau's current CAMA software system. All aspects of this Request for Proposal will be in accordance with the City of Wausau Procurement Policy. A copy of the procurement policy is available at the City Clerk's Office, 407 Grant Street, Wausau, Wisconsin 54403. The procurement policy includes prohibitions against gratuities and kickbacks.

The City reserves the right to reject, in whole or in part, any and all proposals; to waive any technical deficiencies in the proposals; to accept the proposal and award final contract to the responsible Firm determined to be the most advantageous to the City. The contract shall be awarded in accordance with the terms and conditions of the Procurement Policy and the contract shall comply with Sections G and J of this Request for Proposal. This solicitation may be canceled if doing so is determined to be in the best interests of the City. Upon award of the contract, all submitted documents become subject to the Open Records Law of the State of Wisconsin.

B. Time Schedule

The City intends to procure the CAMA software in accordance with the following schedule. The City reserves the right to modify or change any part of this schedule, as necessary. The City will also entertain any recommendations regarding its planned schedule for implementing the new system.

Release RFP to vendors on State of Wi Vendornet http://vendornet.state.wi.us/vendornet/default.asp	Tuesday September 13, 2016
Vendor questions (if any) due to the City	Tuesday, September 27th, 2016
Proposal responses due	Tuesday, October 11, 2016 @ 4:30 PM
Proposals opened at the Board of Public Works meeting following the due date	
Reference checks, vendor visits and product presentations	October-mid November, 2016
Finalist(s) selected	Late November 2016
Negotiate contract for software and services	Early December 2016
Finance Committee & Common Council Approval	Mid December, 2016
Contract awarded	Mid December, 2016
Project commencement	January 2017
System go-live	June/July 2017

C. Proposal Provisions / Instructions to Firms

1. All responses must be addressed to, and mailed or delivered to:

City-County IT Commission
Attn: Julie Henrichs
407 Grant Street
Wausau, Wisconsin 54403-4783

2. Clarifications - If additional information is needed to interpret the specifications/ requirements, written questions should be directed to the project coordinator: Julie Henrichs at the above address or via e-mail Julie.Henrichs@co.marathon.wi.us. All questions must be in writing and received by the close of business (4:30 P.M. CDT) on Tuesday, October 11th, 2016.
3. Responsibility – It is the responsibility of all Firms to carefully read the entire Request for Proposal (RFP) which contains provisions applicable to successful submission and completion of a proposal. All questions, prior to contract award, must be in writing and directed as detailed above. From the issue date of this request for proposal until contract award is made, respondents are not permitted to communicate with any employee about the subject or contents of this request for proposal except as outlined above. Violation of this provision may result in rejection of the respondent’s submission. No information provided verbally or by any other personnel will be considered binding. All respondents shall use this written document and its attachments as the sole basis for proposal at this time.
4. All proposals must be typewritten and shall be delivered in a sealed envelope or other USPS approved container and clearly marked in the lower left corner: “CAMA Software and Services”. All proposals must be received by 4:30 P.M. (CDT) on Tuesday, October 11, 2016. **Proposals received after that date and time will be rejected.** Actual receipt is required by that time. Deposit in the mail is not sufficient. Proposals will be accepted up to 48 hours late if Proposer provides receipt from the contracted shipping company guaranteeing delivery prior to the due date and time.

Submittals by FAX or E-mail are not acceptable and will be rejected. Proposals will not be opened publicly.
5. Submit one (1) original proposal, three (3) hard copies, **and** one (1) electronic copy (CD, DVD or USB) in MS Word (PDF format may be used for your proposal, brochures, and other collateral material, but not for the City’s required Word forms for response to requirements and pricing). The proposal shall be typewritten and submitted on 8 ½” x 11” papers and assembled in a 3-ring binder. It may be typed on one or both sides of the paper. If oversized sheets must be used, they shall be folded to conform to the 8 ½” x 11” size requirements. Proposals shall be signed and dated by an official authorized to bind the Firm in legal matters.
6. This request for proposal does not commit the City to award a contract, to pay any costs

incurred in the preparation of a response to this request or to procure or contract for services or software. The City reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this request for proposal, if it is in the best interests of the City to do so. The City may require respondents to participate in negotiations or to submit such price, technical or other revisions in their proposals as may result from negotiations.

7. The City further reserves the right for itself and any of its agents or contractors, to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal. Such clarification can be in any form including but not limited to conference calls, email communications, Web demos, additional onsite demos or vendor headquarters visits. Finally the City reserves the right to share the RFP, proposals and any subsequent vendor provided information with any consultant of City's choosing in order to secure an expert opinion; and to make copies of proposals for evaluation purposes or as required for legal or regulatory compliance.
8. Amendments:
 - a) **By City:** This request for proposals may be amended by the City in response to the need for further clarification, specifications and/or requirements, changes, new due date, etc. Amendments will be posted on the State of Wisconsin Vendornet website, <http://vendornet.state.wi.us/vendornet/default.asp>.
 - b) **By Firm:** After receipt by the City, proposals may only be amended by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the proposal response due date unless requested by the City.
9. Withdrawal of Proposal - Any proposal may be withdrawn up until the date and time set above for the response due date of the proposals. Proposals shall remain firm once submitted and may not be withdrawn for a period of ninety (90) days.
10. Public Information – All submitted proposals become the property of the City and information included therein or attached thereto shall become public record after recommendation for endorsement of contract is made. In order to protect the integrity of the contracting process, proposals will not be disclosed until after award and signing of any and all contracts that may result from this Request for Proposal. All materials provided to the City by the respective Firm are subject to State of Wisconsin public disclosure laws. Any information contained in the proposal that a Firm desires to claim as proprietary and exempt from disclosure must be clearly designated, including identifying the page and particular exception(s) from disclosure. The City will try to respect all material identified by Firms as being confidential, but requests that Firms be highly selective of what they mark as Confidential. The City will make a disclosure decision predicated upon applicable laws and can choose to disclose information despite its being marked as confidential or proprietary. Marking the entire proposal as proprietary or confidential, and, therefore, exempt from

disclosure will NOT be accepted or honored, and may result in disclosure of the entire proposal or disqualification of the proposal solely at the discretion of the City. Documents identified as Confidential will not be treated as such if public disclosure laws take precedence, if the information is publicly available, is already in the City's possession, is obtained from third parties without restrictions on disclosure, is independently developed by the City without reference to Confidential Information, or is required to be disclosed by order of a court or other governmental entity.

11. Contents of Proposal - All attachments, additional pages, addenda or explanations supplied by the respondent with this proposal shall be considered as part of the proposal response.
12. Use of Brand Names - The use of brand names is for the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.

D. Entity Overview

The City of Wausau is located in Marathon County. Incorporated in 1872, the City of Wausau covers over 18 square miles and has a population of 39,106 (per 2010 US Census). The City operates under the Mayor-Council form of government. The 11 alderpersons represent 11 districts, serving 2-year terms, with all alderpersons elected every two years. The Mayor is elected to serve a four-year term and serves as the City's chief executive and administrative officer.

Wausau provides a full range of services typical of municipal governments, including police, fire and emergency medical protection; public works activities such as highway and street maintenance, refuse and recycling collection, water utility and wastewater treatment services; parks and recreation activities; community development activities including planning and zoning enforcement, economic development, and construction inspection; and general and financial administration (finance, legal, property assessment, information technology, and human resources).

As of the most recent debt issue in 2016, the City continues to maintain an Aa2 rating from Moody's Investor's Service, Inc. The City government includes 15 departments, and employs 330 full time equivalent (excluding temporary) employees. The City's fiscal year ends on December 31.

Assessment Department

The City of Wausau – When at full staff, the Assessment Department consists of a City Assessor, two Senior Appraisers, three Property Appraisers, and one Office Technician.

For the 2015 Assessment Year, in the City of Wausau there were 17,175 total parcels: 13,291 Residential Properties (12,498 Improved), 1,290 Commercial Properties (1,133 Improved), 74 Agricultural Properties, 6 Agricultural Forest Properties, 9 Productive Forest, 4 Other Properties (2 Improved), 3 Managed Forest Property, 8 Undeveloped Properties, 577 Exempt Properties, 80 Manufacturing Properties, 57 Manufacturing Personal Property Accounts, 1,594 Commercial Personal Property Accounts and 182 mobile home lots.

The City of Wausau also provides contract assessment services for the City of Schofield since 2013. For the 2015 Assessment Year the City of Schofield has 1,436 total parcels: 792 Residential Properties (726 Improved), 212 Commercial Properties (186 Improved), 62 Exempt Properties, 26 Manufacturing Properties, 2 Utility Properties, 15 Manufacturing Personal Property Accounts, 258 Commercial Personal Property Accounts and 69 mobile home lots.

E. Budgetary and Technology Information

The City's 2016 adopted budget of approximately \$96.3 million includes approximately \$8.8 million for capital improvements. The remaining \$87.5 million funds the municipal services listed in the preceding paragraph. The City prepares a comprehensive budget document, including both operating and capital budgets, which is adopted by the Common Council in November for the subsequent fiscal year. The budget document is available for review on the City's website (www.ci.wausau.wi.us). The City's accounting structure uses funds and departments typical of other Wisconsin governments.

The City utilizes the following technology resources provided by the City-County Information Technology Commission (CCITC):

Overview of Current CCITC Network - For reference purposes only.

- 1) Network Environment - The CCITCC currently supports the following:
 - a) Switched 10/100/1000 Mb Ethernet to the desktop.
 - b) Power Over Ethernet
 - c) A (3) node 10 Gigabit Ethernet backbone over fiber optic cable
 - d) High traffic hosts are Gigabit attached
 - e) TCP/IP protocol is currently supported
 - f) WAN services to several NCHC sites; DSL, private and leased point-to-point wireless, and leased fiber service
 - g) LAN to LAN VPN
- 2) Desktops Standard - CCITCC currently purchases HP desktops and Laptops with Windows 7 or Windows 10
- 3) Mobile Devices – CCITCC supports iPads, iPhones and Android Smartphones and Surfaces.
- 4) Servers Standards - If we need to install a local application, then our preferred new installation is Windows 2012 R2 on VM Ware and Cisco B-Series. We also are interested in looking at Hosted solutions.
- 5) Directory Services - CCITCC uses Active Directory and prefers that all new applications authenticate to the Active Directory.
- 6) Application Software
 - a) The CCITCC currently supports the following major third-party application software products:
 - i) SunGard Public Sector Appraisal Plus running on the iSeries.
 - ii) Cayenta Financials
 - iii) ESRI ArcGIS
 - iv) Deketo Tract Index and Posse running on the iSeries and network servers.
 - v) Laserfiche Document Management Software (Includes pictures of all Wausau properties)
 - vi) Affinity Integration Tools for Laserfiche
 - vii) Apex Software Apex Sketch – Assessor
 - viii) Marshall & Swift Commercial Estimator
 - ix) InfoVision Evolve software for permitting and licensing
 - b) The CCITCC currently supports the following major internally developed software products running on the iSeries:
 - i) Land Records which includes the following integrated applications:
 - (1) Taxes and Assessments,
 - (2) Inspections permitting and violation reporting,
 - (3) Zoning,
 - (4) Land Conservation.

F. Scope of Project

The purpose of this software selection project is for the procurement of a Computer Assisted Mass Appraisal (CAMA) solution containing the following (REQUIRED) functionality:

- 1) Property Management Functions
- 2) Sales Analysis
- 3) Valuation System
- 4) Integration
- 5) Inquiry Functions
- 6) System Defined Reports
- 7) User Defined Reports and Queries
- 8) System Setup and Administration

See the Exhibit C for a detailed list of items requested.

The City desires an integrated CAMA system. It is important to have a system that is easy to use, maintain, and integrate with other disparate applications.

G. Contract Terms and Conditions

The following contractual conditions shall be included in the contract entered into by the City and the successful Firm:

Insurance Requirements

The successful Firm shall not commence work under this contract until all insurance required under this section is obtained, and such insurance has been approved by the City Attorney, nor shall Firm allow any subcontractor to commence work on their subcontract until all insurance requirements have been obtained and approved.

Workers Compensation Insurance - Firm shall obtain and maintain throughout the duration of this contract statutory Worker's Compensation Insurance for all of its employees employed at the site or while working on this project. In case any work is sublet Firm shall require the subcontractor similarly to provide statutory Worker's Compensation Insurance for all of the latter's employees, unless such employees are covered by protection afforded by Firm.

General Liability, Professional Liability and Property Damage Insurance - Firm shall secure and maintain in force throughout the duration of this contract such General Liability, Professional Liability and Property Damage Insurance as shall protect him/her and any subcontractor performing work covered by this contract from claims for damages for personal injuries including accidental death, as well as from claims for property damage, which may arise from operations under this contract, whether such operations be by Firm, or by any subcontractor or by anyone directly or indirectly employed by either of them; and the amount of such insurance shall be as follows:

- Comprehensive General Liability, \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
- Professional Liability Coverage, \$ 1,000,000 per occurrence and in aggregate.
- Automobile Liability, \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
- Excess Liability Coverage, \$1,000,000 over the General Liability and Automobile Liability Coverages.
- If aircraft are used in conjunction with this project, \$ 2,000,000 per occurrence and in aggregate for bodily injury and property damage.

Proof of Insurance

1. The Firm shall furnish the City Attorney with a Certificate of Insurance, naming the City as an additional insured, countersigned by a Wisconsin Resident Agent or Authorized Representative of the insurer indicating that the Firm meets the insurance requirements identified above.
2. The Certificates of Insurance shall include a provision prohibiting cancellation of said policies except upon (30) days prior written notice to the City Attorney and specify the name of the contract or project covered.
3. The Certificate of Insurance shall be delivered to the owner, with a copy of the Certificate of Insurance to be delivered to the City Attorney for approval prior to the execution of this contract.
4. The Certificates shall describe the contract by name and or identification number in the "Description of Operations" section of the form.

Applicable Law

Except as otherwise specifically provided herein, this contract shall be governed by and construed according to the laws of the State of Wisconsin. The Firm shall comply with all local, state and federal laws and regulations applicable to this Contract and applicable to the goods and services provided under this Contract.

Termination of Contract

The City may, for its convenience, terminate this contract at any time by a notice in writing from the City to the Firm by certified mail. If the contract is terminated by the City as provided herein, the Firm shall be paid an amount which bears the same ratio to the total compensation as the services actually performed bear to the total services of the Firm covered by this contract, unless payments of compensation have previously been made.

Change Orders

The scope of the services to be performed under this contract may be amended or supplemented by mutual written agreement between the parties to the contract. This amendatory provision shall not operate to prevent the City from exercising its reserved right to establish reasonable time schedules of and for any of the work or services to be performed by the Firm hereunder, nor to cancel any of the services not performed at the time notice is given to the Firm of the cancellation of such services or portion of the work to be performed hereunder.

Gratuities and Kickbacks

It shall be unethical for any person to offer, give, or agree to give any elected official, employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer for employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the contents of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceedings or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or contract, subcontract, or any solicitation or proposal therefore.

It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or a higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract, or order.

Non-appropriation of Funds

Notwithstanding anything contained in this contract to the contrary, no Event of Default shall be deemed to have occurred under this contract if adequate funds are not appropriated during a subsequent fiscal period during the term of this contract so as to enable the City to meet its obligations hereunder, and at least thirty (30) days written notice of the non-appropriation is given to Firm.

MUTUAL INDEMNIFICATION/HOLD HARMLESS.

The Firm, _____, hereby agrees to release, indemnify, defend, and hold harmless the CITY, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and reasonable attorney's fees, which may be sustained or to which

they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of _____'s officers, officials, employees, agents or assigns.

The CITY hereby agrees to release, indemnify, defend, and hold harmless the Firm, _____, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and reasonable attorney's fees, which may be sustained or to which they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of CITY's officers, officials, employees, agents or assigns. CITY does not waive, and specifically reserves, its rights to assert any and all affirmative defenses and limitations of liability as specifically set forth in Wisconsin Statutes, Chapter 893 and related statutes.

Americans with Disabilities Act Compliance

In connection with performance of work under this contract, Firm agrees that no qualified individual with a disability, as defined by the Americans with Disabilities Act, shall, by reason of such disability, be excluded from participation and the benefits of services, programs, or activities, including employment, or be subjected to discrimination. The Firm is specifically notified that it is subject to all employment requirements listed under Title I of the Americans with Disabilities Act by virtue of its contract with the City, a public entity. The Firm is specifically notified that it is subject to federal requirements to assure participation and access to public facilities, programs, and activities under Title II of the Americans with Disabilities Act by virtue of its contract with the City, a public entity. These requirements mandate separate or special programs or reasonable modification of existing programs, services, and activities without surcharge to disabled individuals as long as safety is not compromised. The Firm shall provide a similar notice to its subcontractors.

Dispute Resolution

If a dispute related to this agreement arises, all parties shall attempt to resolve the dispute through direct discussions and negotiations. If the parties cannot resolve the dispute and if all parties agree, it may be submitted to either mediation or arbitration. If the matter is arbitrated, the procedures of Chapter 788 of the Wisconsin Statutes or any successor statute shall be followed. If the parties cannot agree to either mediation or arbitration, any party may commence an action in the Circuit Court of Marathon County. If a lawsuit is commenced, the parties agree that the dispute shall be submitted to alternate dispute resolution pursuant to §802.12, Wis. Stats., or any successor statute. Unless otherwise provided in this contract, the parties shall continue to perform according to the terms and conditions of the contract during the pendency of any litigation or other dispute resolution proceeding.

The parties further agree that all parties necessary to the resolution of a dispute (as the concept of necessary parties is contained in Chapter 803, Wisconsin Statutes, or its successor chapter) shall be joined in the same litigation or other dispute resolution proceeding. This language relating to dispute resolution shall be included in all contracts pertaining to this project so as to provide for expedient dispute resolution.

Non-Debarment Clause

Firm hereby certifies that neither it nor any of its principal officers or officials has ever been suspended or debarred, for any reason whatsoever, from doing business or entering into contractual relationships with any governmental entity. Firm further agrees and certifies that this clause shall be included in any subcontract of this contract.

Statement of Compliance

Vendor has carefully reviewed the City's required contract language, as set forth in the Request for Proposal/Bid pertaining to termination of contract, change orders, gratuities and kickbacks, non-appropriation of funds, hold harmless/indemnification, ADA compliance, insurance requirements/proof of insurance, dispute resolutions, non-debarment, and is in full compliance with all statements and requirements. This contract language is incorporated herein by specific reference as if set forth in full. Any statements set forth in this contract document that conflict with the City's contract language are superseded by the City's required contract language.

Assignment or Subcontract

This contract may not be assigned or subcontracted by the Firm without the written consent of the City.

Independent Contractor Status

The Firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same of any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Force Majeure

The term "Force Majeure" shall include, with limitation by the following enumeration: acts of God or Nature; acts of civil or military authority; terrorism; fire; accidents; pandemic outbreaks; power shortage; telecommunication or data communications; shutdowns for purpose of emergency repairs; strikes and any other industrial, civil or public disturbances that are not reasonably within the control of a party, causing the inability to perform the requirements of this Contract. If any Party is rendered unable, wholly or in part, by a Force Majeure, to perform or comply with any obligation or condition of this Contract then, upon giving notice and reasonably full particulars to the other Party, such obligation or condition shall be suspended only for the time and to the extent reasonably necessary to allow for performance, compliance and restoration of normal operations. If only the Firm is impacted by Force Majeure and more than 60 days has elapsed then the City shall be entitled to exercise any remedies otherwise provided for in this Contract, including termination for default.

Warranty

A warranty is sought for both the software and implementation services.

Software

1. The selected Firm will warrant that the proposed software will conform in all respects to the requirements and specifications as stated in the RFP, except for minor or inconsequential errors. Specifically, the detailed requirements as stated in this RFP will become part of the selected Firm's contract and will be warranted as such. Any repairs or "bug fixes" required during this period will be made at no expense to the City.
2. The selected Firm must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional requirements as included in this RFP.
3. State that the warranty, at a minimum, should be valid for the duration of the implementation and for a minimum of one year after final acceptance of all modules/suites/applications included in the implementation. The City will look more favorably at Firms with warranty periods longer than the minimum specified herein.
4. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), describe the software warranty for the software quoted. Identify all coverage points. Please specify when the warranty period begins and ends.

Implementation and Professional Services

1. The City expects a warranty for implementation and professional services (e.g. work products, developed modifications, and system configuration) for a minimum of 12 months after the final acceptance (configuration phase) date of the respective modules, except for minor or inconsequential items. It is assumed that Firms have priced their services to include these warranty provisions. The extent of the warranty coverage will be evaluated as part of the overall procurement process.
2. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), state the implementation services warranty for the software quoted. Identify all coverage points. Please specify when the warranty period begins and ends.
3. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), specify what costs for repairs the City may be responsible for while the system is under warranty, e.g., labor, travel expenses, parts, etc.

Payment and Performance Guarantee

The City has a requirement to have some retainage and means for software and vendor performance assurance, and as such, proposes the following payment schedule:

- 15% upon signing of contract
- 10% upon successful installation and acceptance of initial software functionality
- 05% upon accepted first conversion of Sungard data accepted by the City
- 10% upon modeling of prior year's data that is within 5% of that year's value
- 05% All interfaces working properly
- 20% upon customization completed, tested and successful, training completed successfully, system ready for Go-Live with current data conversion
- 35% upon final acceptance (City will create a "punch list" 60 days after "go-live" of non-conformance issues to be corrected. Final acceptance takes place upon City acceptance that the "punch list" items have been corrected. The City agrees to be reasonable in its list.

- The city expects this project to be completed within 7 months of contract signing. As we finalize the contract language we will have penalties defined for delays caused by the vendor that extend the Go-Live past 7 months.

Renewal Costs

Regardless of whether or not we purchase a product that is installed on our network or purchase a hosted solution that runs at a vendor's website, we expect to control annual renewal increases. Our contract with the successful bidder will include a stipulation that the annual support or lease costs cannot increase at all in the first 3 years and thereafter, cannot increase more than the previous year's consumer price index + 1%. If you cannot accept this stipulation, please clearly state what your proposed cap would be for the automatic renewal process when you respond to the RFP.

Acceptance of Terms and Conditions

Submission of a proposal shall constitute acknowledgment and acceptance of all the terms and conditions contained in this Request for Proposal. The selected Firm(s) will be required to enter into a formal contract with the City (see Section J – Contract below).

H. Technical Proposal Requirements and Format

In order for the City to adequately compare proposals and evaluate them uniformly and objectively, all proposals **must** be submitted according to the following format. Each proposal should be assembled in a three ring binder, include a table of contents and be separated by section and tabbed with the proposal heading.

Your proposal should provide a straightforward, concise description of the proposed software and services and your ability to deliver the same. Emphasis should be on completeness and clarity. Unnecessarily elaborate brochures, artwork or other presentations beyond that sufficient to present a complete and effective proposal **is not desired**.

SECTION	TITLE	CONTENTS
Section 1	Cover Letter	<p>The transmittal letter should be:</p> <ul style="list-style-type: none"> ▪ On your letterhead ▪ Signed by an official in your organization authorized to bind his or her firm to all statements, including services and prices, contained in the proposal. ▪ State the length of time the proposal terms remain firm, which must be for a minimum of 120 days from the proposal due date. <p><i>Please note that an unsigned cover letter will cause rejection of the proposal.</i></p>
Section 2	Table of Contents	<p>The table of contents of the proposal should include a clear and complete identification of the material submitted by section and page number.</p>
Section 2	Executive Summary	<ul style="list-style-type: none"> ▪ Complete the Software Vendor Executive Summary Response Chart from Exhibit A - Required Vendor Information of this RFP. <p><i>Please note that in the space provided in the Executive Summary Response Chart, Firms must identify the primary engagement contact for the software vendor –including a valid e-mail address. We have the option to require a Firm to provide additional information and/or clarify requested information.</i></p>
Section 3	Audited Financial Statements & Annual Reports	<ul style="list-style-type: none"> ▪ Provide corporate financial information as requested in Exhibit F. Finalists will be required to furnish the company's most recent annual report and the last two (2) years' annual financial statements for proof of financial solvency.
Section 4	Contract Terms and Conditions	<ul style="list-style-type: none"> ▪ Description of your method for supporting the City's required contract terms and conditions. ▪ Describe the software warranty for your software. ▪ State the implementation services warranty for the quoted software. Identify all coverage points. Please specify when the warranty period begins and ends. ▪ Specify all costs that we may be responsible for while the system is under warranty, e.g., labor, travel expenses, parts, etc.

		<i>Please limit this section to no more than four (4) pages.</i>
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Section 5	RFP Exceptions	<p>Complete the Exceptions Form (see Exhibit B) and include it in this section. Identify ALL Exceptions to this RFP, including contract terms and conditions, and proposed payment schedule. If you provide a sample of your contract you are still required to identify in this section all exceptions you have to the City’s contract terms and conditions.</p> <p><i>We will not recognize any exceptions to this RFP unless they are clearly identified IN THIS SECTION of the RFP Response.</i></p>
Section 6	Scope of Services	<p>Include a general discussion of the Firm’s understanding of:</p> <ul style="list-style-type: none"> ▪ “Overall” project ▪ Scope of work proposed ▪ Proposed version of your product, when it was released for general availability and how many customers (not users or locations) are installed on the proposed product and version proposed. ▪ Summary of the features of your proposed software product ▪ Summary of any other modules or services that you offer that you feel that we should be aware of <p><i>Please limit this section to no more than two (2) pages.</i></p>
Section 7	Functional Requirements	<p>Please include the following in this section of your proposal:</p> <ol style="list-style-type: none"> 1. A brief summary of the functionality that your software has for the following: <ul style="list-style-type: none"> • Property Management Functions • Sales Analysis • Valuation System <ul style="list-style-type: none"> ○ Land ○ Residential ○ Commercial ○ Exempt ○ Manufacturing / Industrial ○ Personal Property ○ Mobile Home • Integrations • Inquiry Functions • System Defined Reports 2. Completed Requirements Document from Exhibit C – Functional Requirements Response. <p><i>Provide a response for each requirement. Leaving a requirement blank may deem a Firm unresponsive.</i></p>
Section 8	Architecture	<p>Describe the system architecture, what software development tools are you using? List version numbers. What reporting tools are</p>

		supported – SQL SRSS and or Crystal? Are there standard published APIs for interfaces? If we wish to enhance the product, what knowledge and software development tools will we need in house?
Section 9.A	Technical Requirements (Locally Installed Software)	<p>NOTE: We wish to evaluate both locally installed and hosted solutions (that run on the vendor’s network). If you support both options, please present separate pricing on both options. Fill out the applicable sections 9.A and 9.B or just the section applicable to the solution that you propose.</p> <p>Include technical information regarding your proposed software:</p> <ul style="list-style-type: none"> ▪ Desktop requirements ▪ Mobile options that you support: Apple iPad app, Android App, Surface, other tablets that have been tested. ▪ Thin client solutions that are confirmed as supported: Citrix, VMWare View, etc. ▪ Server side environment (database, hardware, server operating system, network requirements, etc., Virtual technology supported?) ▪ Data conversion capabilities and requirements ▪ Recurring Service (recommended backups, routine database administration, performance tuning, other system maintenance, etc. ▪ Number of versions that we can install with the proposal – in other words – can we have a Disaster Recovery instance? How about a Test instance? Identify any extra costs in terms of setup, installation, configuration, testing, training and licenses related to having extra instances installed locally. ▪ Interfaces already built to other software. Included or not? ▪ Proposed methodology for integration of the CAMA system with Laserfiche for document management ▪ Proposed methodology for integration of CAMA system with APEX for sketching ▪ Proposed methodology for integration of the CAMA system with Microsoft Outlook. ▪ Proposed methodology for integration of the CAMA system with the ESRI GIS application. The City is currently running version 10.0 and is planning on upgrading to version 10.1 in 2013.
Section 9.B	Technical Requirements (Hosted Solution)	<p>Include technical information regarding your proposed software:</p> <ul style="list-style-type: none"> ▪ Desktop requirements ▪ Mobile options that you support: Apple iPad app, Android App, Surface, other tablets that have been tested. ▪ Thin client solutions that are confirmed as supported: Citrix, VMWare View, etc. ▪ Data conversion capabilities and requirements ▪ Recurring Service that we would be expected to perform if applicable ▪ Can we access a Test instance? Identify any extra costs in terms of setup, installation, configuration, testing, training and licenses related to having access to a test instance ▪ What is your disaster recovery plan and methodology for

		<p>maintaining high availability?</p> <ul style="list-style-type: none"> ▪ How would we get our data back if we switched vendors a few years into the contract? Costs involved in getting the data? Format that it would be provided? ▪ Interfaces already built to other software. Included or not? ▪ Proposed methodology for integration of the CAMA system with Laserfiche for document management ▪ Proposed methodology for integration of CAMA system with APEX for sketching ▪ Proposed methodology for integration of the CAMA system with Microsoft Outlook. ▪ Proposed methodology for integration of the CAMA system with the ESRI GIS application. The City is currently running version 10.0 and is planning on upgrading to version 10.1 in 2013.
Section 10	References	<p>Please list at least five (5) references of other customers with installed systems of the software that you are proposing who are similar to our requirements, using the format included in Exhibit D. Specify the exact version of the software and all modules that the customer is using.</p> <p><i>References will be contacted (this may be an on-site visit) as part of the proposal evaluation process. (We are particularly interested in Wisconsin cities with similar requirements, number of employees, and number of parcels.)</i></p>
Section 11	Implementation Staff	Provide information as to staff expected to be assigned for software implementation by filling out Exhibit E.
Section 12	Implementation Methodology	<p>Provide a brief overview of your implementation methodology and expected timeframe for this project including resources that we are required to provide in terms of time and tasks that will be assigned to us.</p> <p><i>Please limit this section to no more than two (2) pages.</i></p>
Section 13	Pricing	<p>Provide a summary overview of the pricing model used to estimate costs including module pricing and implementation services. Information regarding users and other data that may be used in developing pricing is included in Exhibit A.</p>
Section 14	Other Information and Attachments	<p>Include in this section a copy of your proposed license, maintenance and implementation services agreements (sample contracts), along with any agreements relative to 3rd party providers. NOTE: Any exceptions to our contract terms and conditions, payment schedule, etc. must be noted on the Exception Form in Section 5 of your proposal. Also include a copy of a certificate demonstrating the required insurance coverage's outlined above under Terms and Conditions.</p>
Section 15	Other Vendor Information	<p>Use this section if you have any other material that you feel is important for our evaluation. Please limit the pages in this section. We are not interested in unnecessary sales literature.</p>

I. Evaluation of Proposals

The City and/or its representatives will be the sole judge of the appropriateness and completeness of any and all proposals and reserves the right to reject any and all proposals that do not provide the information requested. Neither the City nor any agent thereof on behalf of the City of Wausau shall be obligated in any fashion by any response(s) to this RFP. The City reserves the right to negotiate those issues not included in the proposal document. The City will not reimburse Firms for costs incurred in preparing proposals or traveling to any City of Wausau location to demonstrate products.

Proposals will be objectively evaluated by a qualified team of CCITC staff, City of Wausau staff and/or stakeholder representatives. The most responsible proposal will be determined by criteria determined essential to the City as outlined below. The evaluation criteria are not limited to the lowest price.

The City may choose to conduct site visit(s) to the software vendor's headquarters and/or Firm's clients as part of the evaluation process. The site visits will be considered as part of the determination of the successful Firm. Evaluation of the client sites will be based on but not limited to the following:

- Assessment of the Firm's performance during system implementation.
- Assessment of the quality of Firm's ongoing support.
- Overall user satisfaction with the system and its reporting functionality

Each proposal will be examined to ensure that it follows the proposal format and instructions in this RFP.

The City is seeking a Firm with the following qualifications:

- Is a viable vendor in terms of financial position, customer base, and technology
- Has ability to provide and implement an integrated CAMA Software system that meets the City's requirements as described in this RFP.
- Has ability and flexibility to meet the City's regulatory and contractual requirements, and vendor expectations as summarized in this section and as detailed in the RFP.
- Has experience in Wisconsin
- Has experience with municipalities the size of Wausau and the surrounding area
- Has ability to support more than one municipality at a time
- Is willing to enter into a contract which supports performance milestones, and penalties when not met
- Has a proven history of successful on-time, on-budget and in-scope implementations of the proposed software with the functionality required by the City for public sector entities similar to Wausau.
- Provides a modern software application that will be easy to support for the foreseeable future with the flexibility to accommodate new technologies and future workflow changes within the department.

- Provides a way for the City to protect its software investment and responsibly manage its ongoing support costs for at least eight years.
- Provides technical expertise and guidance in the implementation and configuration of the system (software, database, hardware, network and integration with 3rd party applications), and ongoing customer support following system implementation.

Proposals will be evaluated on some or all of the following criteria:

- Ability to deliver an integrated solution that meets functional requirements with minimal customizations
- Firm's experience with similar customers and similar projects
- Firm's qualifications (financial strength, company size, stability, product vision and direction, and ability to work with the City and CCITC)
- Firm's development and project management capacity, available support staff and response time expectations,
- Firm's recommended project plan, including installation, configuration, testing, and conversion timeframe
- Whether the vendor agrees to a data conversion, then (assuming there are errors) repetitive data conversion runs until we have a clean conversion, clean testing of the software with the clean converted data, then a final data conversion just before Go-Live.
- Technology that meets the CCITC's technology and IT strategic plan requirements
- Training plan
- Feedback from customer references on vendor performance, reliability, service level and customer service and responsiveness
- Demonstration of software and tools
- Firm warranties for the software and implementation services
- Adherence to requirements for RFP response including specified format
- Conformance to required contract provisions
- Total cost of ownership over 5 years (Software, annual maintenance and support, implementation services, training, hardware, database, resources required, etc.)
- Quality and completeness of the proposal

All proposers will be notified in writing when a final selection of a Firm has been made and the contract has been executed. Contract negotiations may be conducted simultaneously with two or more Firms.

J. Contract

If your proposal is accepted and a contract is issued, the contract between the City and the selected vendor to provide the required software and related services will consist of:

- This request for proposal
- The selected Firm's proposal
- The Firm's product demonstration and related handouts and electronic presentations
- Related commentary – any communications from the Firm clarifying the proposal, technology, project planning, implementation services, training, 3rd party applications, software functionality, support services and professional services
- Documents containing any additional items stipulated during contract negotiations
- A mutually agreed upon Statement of Work that outlines the project scope, project timeline, assigned responsibilities (Firm and City) and estimated hours by role for the major work components, deliverables, milestones, and costs by major work component.
- A signature page.

Said contract between the City and the Firm shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto. Any agreement or contract resulting from the acceptance of a proposal shall be on forms either supplied or approved by the City. The City reserves the right to reject or modify any agreement which does not conform to the request for proposal and any City requirements for agreements and contracts.

The submission of a proposal shall be considered as a representation that the Firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon execution of the contract by the proper City officials, and delivery of the fully-executed contract to the Firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful firm. The contract may be amended only by written agreement between the Firm and the City.

The documents constituting the contract between the City and the Firm are intended to be complementary so that what is required by any one of them shall be as binding as if called for by all of them. In the event of any conflicting provisions or requirements within the several parts of the Contract Documents, they shall take precedence in the following order: Change Orders (with the most recent taking precedence); Statement of Work, Contract Document Amendments; the Contract Document as described in the signed Agreement; Request for Proposal Addenda; Request for Proposal; and Firm's Proposal.

Other Contract requirements:

1. The License must allow and include for the license to use and the costs to setup a test and

disaster recovery instance of the software (for software purchases).

2. We will agree on language that defines Final Acceptance that is the date after GoLive in which all critical and significant issues are resolved.
3. The software maintenance is expected to have the first year included
4. Software maintenance starts at Final Acceptance – not installation or the Go-Live dates.
5. For software – all data and information will be owned by City.
6. For cloud solutions:
 - i. The contract will specify that we will be provided all of our data in a csv format at no cost within 5 business days of us requesting it when the contract is terminated plus at least once annual (so that the export is tested annually). If applicable, photos will be in jpg format, videos in mp4 format. Audio in an industry standard format (not AAC).
 - ii. The contract will specify that we will be notified of any information breach in the vendor's cloud within 48 hours, regardless if it is on our servers or on other customers
 - iii. The contract will specify that the cloud solution will have a security audit annually and that the report will be provided to CCITC within 1 month of receipt at no charge. The report will also include the vendor's plans and schedule to mitigate any issues identified. The vendor will keep us informed of the resolution of the identified risks at least every month until resolved.
 - iv. Provide in your response the following:
 - (a) Your method of performing background checks on staff at hire and routinely and your policy on what to do if any candidate or current employee has a felony or has a misdemeanor related to criminal theft or money, products or information.
 - (b) If any information of the City or its partners will be stored outside the US borders
 - (c) Explain what methods of remote access you use and how they are secured
 - (d) Explain how IDs and passwords for access to our servers and content are protected at rest AND while in motion.