June 21, 2023

SUBJECT: Questions and Answers for Request for Proposals (RFP) #2832A – Property Systems Business Process Analysis

1. QUESTION: Page 17 of the RFP references the attachment of a Sample Professional Services Agreement (PSC) is attached to the solicitation but one was not attached. Could one please be provided?

   Answer: The Sample Professional Services Agreement (PSC) is in the solicitation, Page 29. (PSC) will be provided to the awarded proposer.

2. QUESTION: There is reference to the selected consultant developing requirements for a new system, but this is not included in the Scope of Work. Would the County clarify if the selected consultant is intended to develop system requirements for a future system?

   Answer: The consultant/organization can participate in developing the requirements for the future system if the scope of work changes.

3. QUESTION: Does the County have a preference for the documentation format of business processes? For example, a particular business processes diagramming format that would be consistent with other initiatives.

   Answer: Yes, the county will provide specific templates that are consistent with other initiatives.

4. QUESTION: Would the County please confirm the scope of functions within the current Property system? For example, receipting, lien processing, etc.

   Answer: Department of Finance/Auditor Controller/Tax Collection
- Tax Rate Areas (TRAs)
- TRA Changes
- Fund maintenance
- Jurisdictional Changes
- Tax Increment Factors
- Tax Increment & Redevelopment Increment
- Special Assessments & Parcel Taxes
- Debt Service Rates – G.O.
- Debt Service Rate – Unitary
- BOE Utility Roll
- Tax Roll Extension
  - Secured
  - Unsecured
  - Supplemental
- Roll Corrections
  - Assessment Appeals
  - Escape Assessments
  - Refunds
  - Reporting
- HOPTR Claim (Home-Owner Property Tax Relief)
- Allocation Factors (AB8, Supplemental, Unitary)
- Apportionments
  - Teeter
  - Non-Teeter & Redemption
  - HOPTR
  - System Journals to Financial System
- C Reporting
  - Statistical
  - End of Period
  - District Specific
  - TRA Specific
- Tax Billing: Secured, Unsecured, Supplemental, Corrections
- CORTAC Lender Bill Requests
- Payment Processing: Counter, RPS, web, IVR
• CORTAC Lender Payments
• Payment Reversals / Return Checks
• System Journals to Financial System
• Refunds - overpayments
• TC Trust Activities
• Delinquent Notices
• System Notes key/import
• Bankruptcy Flag
• SCO Postponement Flag
• Penalties
  o Application of Penalties
  o Removal of Penalties
• Liens
  o Intent to File Lien
  o Liens
  o Release of Lien
  o Add Fees
• Delinquent Abstract - Create and Maintain
• Power to Sell - maintenance & reporting
• TC Reporting
  o Statistical by Tax Roll
  o End of Period

Property appraisal
• Residential
• Commercial
• Multi-Residential
• Co-operatives
• TIC
• Manufactured Homes
• Agricultural
• Floating Homes
• Possessory Interest
• Leasehold Improvements
• Business property
• Vessels
• Aircraft
• Business Audits
• Appeals
• Exemptions
• Change in Ownership
• Mapping
• Update and Maintain Property records
• Document scanning and storage
• Reports
• Issue Value Notices
• Create assessment rolls
• Building permit processing and workflow
• Sales/Transfers processing and workflow

5. QUESTION: Does the County have a relative preference for the portion of work that is completed onsite vs. virtual? Is the County open to a hybrid methodology with minimal onsite work?

    Answer: Yes, for hybrid methodology with onsite and offsite work.

6. QUESTION: In addition to the required forms, may proposers submit additional proposal narrative describing qualifications and experience, performance history, and project approach?

    Answer: Yes.