



REQUEST FOR INFORMATION
for a
Computer Assisted Mass Appraisal (CAMA) System
for The
CITY OF PHILADELPHIA

Issued by:
THE CITY OF PHILADELPHIA ("City")
Office of the Director of Finance and the
Office of Property Assessment
October 9, 2014

Please submit responses no later than 5:00 PM (Local Philadelphia Time) on October 30, 2014
by email to the address below:

ATTENTION: John Hodge
Municipal Services Building, Suite 1582
1401 John F. Kennedy Boulevard
Philadelphia, PA 19102
john.hodge@phila.gov

Michael A. Nutter, Mayor
Rob Dubow, Director of Finance
Michael Piper, Chief Assessment Officer
Saskia Thompson, Executive Director, Office of Property Data

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I. Introduction

Under the leadership of Mayor Michael A. Nutter, the City has undertaken a significant effort of restructuring its property tax system – an overhaul identified as the Actual Value Initiative (AVI). In 2012, the Office of Property Assessment (OPA) conducted a mass appraisal of all 580,000 parcels within the City, and it is the City’s intent to reassess these parcels on an annual basis in order to achieve uniformity and equality.

The City wishes to modernize its current assessment technology and review its business processes to ensure that the new technology supports best practice processes and operations not just within OPA but also within other departments, offices, and agencies that rely on accurate and reliable property information for their operations.

This Request for Information (RFI) is for research purposes only; it is not a competitive solicitation and will not directly result in a contract for any products or services. Responding to this RFI does not prequalify vendors, nor does failure to respond preclude vendors from responding to any Computer Assisted Mass Appraisal (CAMA) related RFP(s) that may follow.

Those vendors who wish to suggest a product solution for consideration are requested to submit the relevant information as outlined in this RFI. Those vendors that have more than one product are encouraged to submit an RFI response for each product.

It is the City’s intent to move forward with a Request for Proposal in the first quarter of calendar year 2015. It is the City’s hope that the information submitted in response to this RFI will inform the drafting of an RFP and provide insight into budgetary needs for the new technology.

II. Organizational Overview

The City of Philadelphia currently has an inventory of approximately 580,000 property records. This breaks down to the following:

Category	Count	Market Value	Taxable Market Value	Exempt Market Value
Residential	458,543	\$64,493,036,401	\$58,443,452,069	\$6,049,584,332
Hotels and Apartments	41,070	\$18,689,057,600	\$15,101,939,730	\$3,587,117,870
Store with Dwelling	14,832	\$3,288,972,400	\$3,141,024,216	\$147,948,184
Commercial	14,853	\$42,556,801,500	\$16,431,860,641	\$26,124,940,859
Industrial	4,438	\$3,484,385,800	\$2,838,971,931	\$645,413,869
Vacant Land	46,102	\$3,582,292,335	\$1,562,713,507	\$2,019,578,828
Totals	579,838	\$136,094,546,036	\$97,519,962,094	\$38,574,583,942

To give another sense of scale, there are approximately 2,700 deeds recorded each month by the City's Department of Records.

The City has placed a strong emphasis on the sales comparison approach to values within the assessment technology. Please keep this in mind and focus on this as you provide your information for this RFI. Information on how your system supports other methods is also requested, but sufficient focus should be given to the sales comparison approach.

The City has very few sketches and pictures currently in their systems. Conversion from the legacy systems to the new technology will be easier due to the low number of sketches and pictures; however, the new system must have the capability of working with and keeping track of sketches and pictures on each property.

III. Overview of System and Services Required

Currently the City uses three (3) different systems within OPA to provide the assessment functions. These systems are as follows:

- **VSAM:** Ownership, sales, and mailing information is received from the Department of Records. Other information includes property assessments, assessment history, characteristics, abatement and exemption application info, certificates (tax roll corrections), assessment appeals, and other miscellaneous data. VSAM data is keyed on Property ID (Address).
- **Oracle:** Oracle is the repository used to house property characteristics data, property inquiry data received through OPA's public website, First Level Reviews (informal

assessment appeals), and Homestead Exemption applications. Property Characteristics data is keyed on Property ID (Address), other data is keyed on Account Number.

- **Microsoft Access:** Various MS Access databases are used to facilitate internal processing. The largest of these is a tool to aid evaluators and is keyed on Account Number. Sales Validation is contained within this evaluation tool.

The City is looking to replace these legacy applications. In addition to these three, OPA also uses SPSS for modeling purposes. Depending on the system chosen, modeling will either be integrated with the new solution, or SPSS will continue to be utilized and therefore must interface with the new system.

The City is interested in hosting the new technology in the cloud. This environment and system would likely be supported and managed by a vendor to ensure the system is available to the employees (approximately 200) during operational time frames and peak performances. This hosting environment must be secure and robust enough to handle the needs of the City during all phases of the property assessment life cycle. Additionally, the environment must be able to interface with other City systems which for example may utilize mainframe, Oracle, and Microsoft technologies.

IV. Information Requested

The City is requesting commercial vendors who currently provide a Computer Assisted Mass Appraisal (CAMA) solution, and who may want to provide such a solution to the City in response to a possible subsequent RFP, to respond to this Request for Information (RFI). The information requested below outlines the specific items of interest to the City; however, as this is an RFI, Respondents are not required to answer each and every question. Any responses given by any vendor as a result of this RFI may help to frame a resulting RFP that the City may advertise to procure a new CAMA system. Respondents to this RFI are encouraged to also provide any information not specifically identified below but which the Respondent feels will better describe its solution's capabilities.

Organizational Overview

Please give an overview and description of your organization. This should include the overall organizational make up as well as that part of your organization that is dedicated to the support of the CAMA system. Please describe:

- Your organization including headquarters, locations, and size
- How CAMA systems are supported by your organization including what percentage of your organization is dedicated to developing and supporting the CAMA system
- Number of clients using your CAMA system
- Number of clients located in Pennsylvania using your CAMA system

- Type of clients using your CAMA system (for example, townships, larger cities, counties, etc.)
- The largest client (in terms of overall parcels managed) using your CAMA system and how many users are supported during regular and peak usage
- The implementation services available from your organization including conversion of data and training

CAMA Software Functionality

Based on the overview of the system and services required, please provide the following information on your CAMA software solution:

- Name of the product(s) and current version number
- Description of product/system functionality. Please include in this description how your system handles these elements:
 - Data entry and maintenance functionality
 - Property administration functionality
 - Sketching functionality
 - GIS functionality and the importation of GIS data from a central warehouse
 - Valuation methods supported
 - Sales ratio calculations and the level of automation
 - Assessment administration functionality
 - Regression analysis methods supported
 - Workflow functionality
 - The level of system and user configurability within functions
 - Condominium evaluation process
 - Office Building (with mixed use space) evaluation process
 - Appeal Process functionality
 - Abatement functionality
 - Exemption functionality (including special programs such as Homestead and Longtime Owner Occupant as they arise)
 - Electronically submitted Abatement, Exemption, and First Level Review documentation.

- Sales, Income, and Cost analysis functionality
- Describe any other system functions supported
- List of property types supported
- List of valuation approaches supported
- Description of CAMA methodologies supported
- Describe the level of remote data verification supported in your system and how this is done – include aerial imagery and street level imagery
- Describe the process for street level data entry while on site

Technical Architecture

Describe the technical architecture in which your application is developed and hosted. Please include:

- Language and development environment used
- Describe the architecture for:
 - Presentation layer
 - Business logic layer
 - Database layer
- Describe the deployment process for your application (including initial deployment and system updates), include if the application can be distributed over servers and the environment. Please also include any toolsets leveraged
- Describe any third party controls or tool sets that are utilized and if they are included with the runtime
- Is source code included with the application? If not can it be purchased separately?

Security Functionality

Security is a very important component of a CAMA solution. Describe the security implemented in your solution. Please include:

- The authentication process included with your solution
- The configurability of your solution as it pertains to the security function and whether it is user-configurable
- Does your solution provide for role based authentication, group authentication, or some other type of authentication?

Import Functionality and Interfaces

Describe the level of support your application provides for importing data from third party systems. Please include:

- Import of property transfer data from the recorder of deeds
- Import of building permits data
- Import of zoning information
- Import modeling data from SPSS and other modeling systems
- How your system imports CAMA values from 3rd party systems
- Other imports that are supported by your system
- The level of configurability in the importing functions of your system

Export Functionality, Interfaces, and Reporting

Describe the level of support your application provides for exporting information to third party systems. Please include:

- Exporting for tax bills and tax purposes
- Exporting of information for modeling into SPSS
- Exporting of data into an appeals process
- Exporting of data for land bank or land inventory processes
- The different export formats that are available in your system
- Any other exports that are supported by your system
- Reporting capabilities that are supported by your system
- The level of configurability in the exporting functions of your system

Configurability of CAMA Solution

Describe the level of system and user configurability that is included with your application. Please include:

- Workflow configurability
- Screen and menu configurability
- User role configurability

- Data manipulation and configurability including any user definable data elements that may be supported

Mobility

Describe the level of support for mobility that is included with your base system or as add on options. Please include:

- Architecture supported for mobility
- Types of devices supported
- Features and functions supported by mobility
- For field inspections please describe the level of support for a tablet application and describe the architecture supported (Web, Native or Hybrid). It is desired that the system is not locked into a particular tablet or device
- Please describe seat management capabilities your mobility offering may have. This should include how the mobile application is deployed and updated on the devices

Hosting, Support, and Maintenance

The City's Office of Innovation & Technology (OIT) is moving toward more usage of cloud based offerings. Please provide the following information:

- Does your current solution support a cloud deployment? If so please explain the various options that your organization currently has or partnerships that you have to host your system in the cloud
- If your solution does not support a cloud deployment, please outline what is required for the City to host your solution, and provide a justification as to why this approach is better than a cloud based solution
- Describe your standard Service Level Agreements for your solution and hosting environment
- Describe how you would manage the hosting environment ensuring security, patching, viability, and performance
- Describe your current call center offerings with your hosting and application support

Legacy System Replacement and Data Conversion Services

The City is looking at replacing all three of their legacy applications. These systems are based on VSAM, Oracle, and Microsoft Access. Data conversion is an important aspect of any future solution. Please describe:

- Your implementation services that include training, user acceptance, user support, and maintenance
- Services your organization offers in the replacement of legacy applications
- How your system helps with the data conversion process and what features and functions are available in the base system
- Solutions and offerings that your organization provides to help with data conversion

Other Software Modules

The City is also interested in exploring any other software modules that your organization may have within the entire property tax life cycle which could include tax billing and collection. Please list any optional software modules.

Pricing Structure for CAMA Software and Services

Please provide an overview of your pricing structure for your application and all services that are offered by your organization or partners. These prices will be used for budgetary documentation only and are non-binding. Keep in mind this is not a competitive bid process and no weight will be given to these prices at this time. Pricing should reflect a cost structure based over a five (5) year period. Please provide:

- Levels of pricing for the licensed components of your system and any additional options that can be selected along with related pricing
- An overview of pricing for a hosting environment with any additional options that can be selected
- An overview of pricing for integration, configuration, data conversion, and training necessary to ensure that the City's legacy applications are converted and the users are ready for launch
- An overview of support and maintenance pricing based on your current offerings
- Please disclose any assumptions that have gone into the building of the pricing for your response.

V. Instructions for Suppliers/Vendors for Replying to this RFI

Timeline

- RFI issued October 9, 2014
- Deadline for receiving RFI responses October 30, 2014, 5PM (Local Philadelphia Time)

Questions

Should you have any questions about this RFI, please contact **John Hodge** via email at **John.Hodge@Phila.gov** by **October 16, 2014**. No questions via phone calls will be accepted.

All questions will be answered by **October 22, 2014** and will be posted on the City's website at <http://www.phila.gov/rfp/Pages/default.aspx>.

Terms and Conditions

This RFI is a request for information about software and services for research purposes only. It is not a contract and no contractual obligations shall arise on behalf of the City. The City will not be liable for any costs incurred in the preparation and submission of a response to this RFI.

RFI responses will become the property of the City and may be subject to Right To Know requests. If you believe any part of your response is confidential, that section of your response must be marked as such to allow for easy separation from the rest of the response if the City so agrees. The entire response cannot be marked confidential.

This RFI is the property of the City. The City reserves the right to cancel this RFI (and RFI process) at any time and also to re-issue an RFI for the same or similar requirements.

Response Submission

Submit your response via e-mail by October 30, 2014, 5PM (Local Philadelphia Time).

Please provide one response per product to:

John Hodge
Municipal Services Building, Suite 1582
1401 John F. Kennedy Boulevard
Philadelphia, PA 19102
john.hodge@phila.gov
