THE CITY OF NEW YORK
Department of Finance (the "Agency")
REQUEST FOR PROPOSALS

TITLE: Development, Installation and Implementation of a Computer-Assisted Mass Appraisal (CAMA) System for the Department of Finance

PIN #: 836061211598

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AUTHORIZED AGENCY CONTACT PERSON

Proposers are advised that the Authorized Agency Contact Person for all matters concerning this Request for Proposals is:

Name:	**Robert Schaffer**
Title:	**Agency Chief Contracting Officer**
Mailing Address:	**1 Centre Street, Room 1040 New York, NY 10007**
Telephone #:	**(212) 669-4477**
Fax #:	**(212) 669-4294**

SECTION I – TIMETABLE

A. Release Date of this Request for Proposals: June 22, 2006

B. Pre-Proposal Conference:

Date: Thursday, July 11, 2006
Time: 2:00pm
Location: 59 Maiden Lane, 20th Floor, Training Room, NYC 10038

Attendance by proposers is optional but recommended by the Agency

C. Proposal Due Date and Time and Location:

Date: Friday, July 21, 2006
Time: 3:00pm
Location: Proposals shall be submitted to Robert Schaffer located at 1 Centre Street, Room 1040, New York 10007.

E-mailed or faxed proposals will not be accepted by the Agency.

Proposals received at this location after the Proposal Due Date and Time are late and shall not be accepted by the Agency, except as provided under the New York City Procurement Policy Board Rules, 9RCNY. The Agency will consider requests made to the Authorized Agency Contact Person to extend the Proposal Due Date and Time prescribed above. However, unless the Agency issues a written addendum to this RFP, which extends the Proposal Due Date and Time for all proposers, the Proposal Due Date and Time prescribed above shall remain in effect.

D. Anticipated Contract Start Date: February 1, 2007

SECTION II – SUMMARY OF THE REQUEST FOR PROPOSERS

A. Purpose of RFP

The Agency is seeking an appropriately qualified vendor to provide the development, installation, implementation, and technical and training services for a computer-assisted mass appraisal (CAMA) system for the Department of Finance.

B. Anticipated Contract Term

It is anticipated that the term of the contract(s) awarded from this RFP will be three years from the date of the Agency's notice to proceed. The contract includes options to renew for three (3) one-year periods at the Agency's option. The Agency reserves the right, prior to contract award, to determine the length of the initial contract term and each option to renew, if any.

C. Anticipated Payment Structure

It is anticipated that the payment structure of the contract awarded from this RFP will be a combination of line-item budget reimbursement and performance-based payments that will be based on specific outcome measures and related financial incentives and/or disincentives, unit payments tied to outcomes and liquidated damages tied to outcomes. However, the Agency will consider proposals to structure payments in a different manner and reserves the right to select any payment structure that is in the City's best interest.

SECTION III – SCOPE OF SERVICES

A. Agency Goals and Objectives

The Agency's goals and objectives are:

- Installation of a "state of the art," CAMA System that is easy to maintain and upgrade to satisfy future needs for additional functionality and processing capacity.
- Ensure that valuations of all properties located in New York City are fair, equitable and consistent.
- Flexible appraisal and valuation capabilities.
- Realization of the efficiencies of electronic appraisal functions.
- New system will be operational for the 2007/2008 valuation period, beginning September 2007.

B. Agency Assumptions Regarding Contractor Approach

The Agency's assumptions regarding a program approach that will best achieve the goals and objectives set out above are set forth below.

1. Contractor:

- Contractor would design, implement, integrate and install the entire CAMA System, including all equipment and software, all contracted-for deliverables, and other services required under the contract resulting from the RFP.
- Contractor would attend weekly status meetings with the Agency's project management team and maintain an up-to-date work plan.
- Contractor would be responsible for all maintenance and support services for all elements of the System, including, but not limited to, all equipment and software and any data transport services that are required under the contract, and would be the single point of contact for service and support.
- Contractor would guarantee the availability of maintenance and support services for application software for a minimum of five (5) years from final acceptance of the System.
- Contractor would be responsible for software, hardware and system testing at all stages of the project.
- Contractor would manage data conversion from Legacy system to new CAMA system
- Contractor would develop a computer based training program for the system and conduct training sessions for both regular users and system administrators; up to twenty (20) students would participate in each session
- Contractor would be responsible for providing an adequate disaster recovery plan for the proposed CAMA system.
- Contractor would be bound to the Tax Secrecy provisions set forth in Section VII, below.

- Contractor would meet all established deadlines; greater consideration will be given to proposers that demonstrate that the best overall system can be fully operational in the shortest period of time.
- Contractor would provide a process for detailing additional modifications, enhancements and scope changes to the CAMA System.

2. Software solutions:

- Software solutions would comprise “off-the-shelf” software packages (COTS), custom software solutions systems, or a combination of “off-the-shelf” and custom software.
- Software source code would become the property of the Agency upon acceptance and completion of the product.
- Software would use table driven variables and allow for flexible modeling parameters and data set manipulation.

3. System Requirements:

- The system would comply with the technical, operational and end-user requirements envisioned for a new CAMA system detailed in Appendix D.
- The system would be required to comply with professional appraisal standards such as those promulgated by the International Association of Assessing Officers (IAAO) and the New York State Assessor’s Association.
- The system would provide the ability to capture property characteristic information, permit data, and sales data for over 1,000,000 properties.
- The system would classify property types and generate the appraisal of property using cost, sales comparison, and income approaches.
- The system would accommodate 150+ internal users and have high data throughput and fast system response times. Simple queries would not exceed three (3) seconds in 95% of transactions and in more complex interactions five (5) seconds in 99% of transactions.
- The system would have a user-friendly graphical user interface that facilitates intuitive navigation and presents a uniform look and feel across the entire system.
- The system would provide flexibility to adapt to changing business rules and support user edits to handle special processing needs.
- The system would provide security and audit controls of all levels.
- The system would capture transaction history and change information for all additions, changes and deletions.
- The system would support high-level, state-of-the-art database management of data creation, storage, retrieval and manipulation.
- The system would provide archiving capability and immediate access of historical records.
- The system would generate on-line and printed reports of all user-defined business processes.
- The system would be capable of interfacing with other systems currently in use and with future systems and technologies.
- The system would be capable of integrating the use of hand-held, wireless devices.

- The system would be easy to upgrade to incorporate future technologies and business application enhancements that provide additional functionality and processing capacity.

4. Hardware: Contractor would provide hardware, such as servers and network infrastructure, to support the proposed system if the Contractor's proposed process requires that the Agency use hardware that the Agency is unable to procure otherwise. The CAMA System should be accessible at all five of the Agency's borough offices.

5. Software Licensing: The Contractor would provide licenses for databases, operating systems, and reporting software to support the proposed system if the Contractor's proposed process requires that the Agency use software that the Agency is unable to procure otherwise.

6. Warranty: The Contractor would warrant the system and be responsible for all warranty obligations and the single point of contact for service under the warranty. The warranty period would be a minimum of **one (1) year**, commencing on the Agency's final acceptance of the System and project by the Agency.

7. System Maintenance:

- Contractor would perform software fixes, as required by the Agency, delivered via electronic media.
- Contractor would provide all releases and sub-releases of the application software throughout the entire term of the contract, including all maintenance periods. These releases would be provided within thirty (30) days of initial availability, and would include all technical upgrades to support new releases of the underlying technical infrastructure and application enhancements that provide additional business application functionality.

8. Technical Support:

- Contractor would provide Help Desk support during City business hours (9:00 a.m. to 5:00 p.m. Monday through Friday) for both technical and functional questions regarding the entire CAMA system.
- Contractor would be required to respond to system problems within a two-hour time frame and effectuate the repair for each technical support request within a four-hour time frame.
- Contractor would provide comprehensive, context specific on-line help for all screens without exiting the active transaction, and system manuals with a table of contents and search capability.
- Contractor would provide updates to product documentation delivered concurrently with the software releases and sub-releases. Examples include written documentation, on-line help, on-line reference manuals, and quick reference cards.
- Contractor would provide user group support in the form of face-to-face meetings or electronic discussions.

C. Agency Assumptions Regarding Performance-Based Payment Structure

The Agency's assumptions regarding the performance-based payment structure that will most likely assure them the selected proposer(s) will perform the work under the contract(s) awarded from this RFP in a manner that is cost-effective for the Agency and most likely to achieve the Agency's goals and objectives set forth above are:

A milestone payment schedule setting forth the frequency and amount of progress payments, and identifying the tasks and deliverables ("milestones") to be completed for each payment.

Payment for time spent customizing software, and, if supplied by proposer, payment for materials such as licenses and hardware.

SECTION IV – FORMAT AND CONTENT OF THE PROPOSAL

Instructions: Proposers should provide all information required in the format below. The proposal should be double-sided on 8/12" x 11" paper. Pages should be paginated. The proposal will be evaluated on the basis of its content, not length.

A. Proposal Format

1. Proposal Cover Letter

The Proposal Cover Letter form (Appendix A) transmits the proposer's Proposal Package to the Agency. It should be completed, signed and dated by an authorized representative of the proposer.

2. Technical Proposal

The Technical Proposal is a clear, concise narrative, which addresses the following:

a. Experience

Describe the successful relevant experience of the proposer, each proposed sub-contractor, if any, and the proposed key staff in providing the work described in Section III of this RFP. Provide information that demonstrates that you possess the technical expertise that the Agency requires for this RFP, including:

- Three or more years of experience in the development and successful installation of large-scale CAMA systems that incorporate distributed database design and implementation.
- Previous experience and successful installation of municipal or state information systems that administered a property tax base of more than 500,000 properties and interfaced with Legacy systems.
- Experience in developing and implementing computer-based training programs
- Large-scale project management experience.
- Experience implementing high availability/redundant systems for 24x7 accessibility.
- Experience in installing and maintaining enterprise level applications and databases.
- Experience in managing data conversion and user transition from Legacy systems to the proposed environment.
- Experience with the proposed process to transition to proposed system.
- Additional experience that you consider relevant to this project.

In addition:

- Attach a listing of at least two relevant references, including the name of the reference entity, a brief statement describing the relationship between the proposer or proposed sub-contractor, as applicable, and the name, title and telephone number or e-mail address of a contact person at the reference entity, for the proposer and each proposed sub-contractor if any.

b. Organizational Capability

- Attach organizational charts addressing the delineation of authority and responsibilities in performing the work described in the Proposal and identifying all key personnel, including, but not limited to, the project manager, and the operational and technical (programming) staff members.
- Include company affiliation, job title, and resume of each individual listed on the organizational chart, setting forth work experience, education, professional achievements, and any publications related to the type of work to be performed. (The Agency will require that the key people proposed for this project will continue working in their proposed capacities for the duration of their assignment, unless otherwise directed by the Agency. The Agency must approve all interim substitutions and permanent replacements.)
- Demonstrate the proposer's organizational (i.e. technical, managerial and financial) capability to provide the work described in Section III of this RFP. Specifically address the following:
  - Organizational position: Whether the consulting operation is an internal division of the contractor, and, if so, the division the operation reports to, such as 'Government CAMA Development. Alternatively, if the consulting operation is a separate entity, describe its business relationship to the contractor, such as subsidiary, subcontractor, etc.
  - Nature of business relationship with subcontractors, including other projects in which the proposer has partnered with these subcontractors.
- Attach a chart showing where, or an explanation of how, the proposed services will fit into the proposer's organization.
- Attach a copy of the proposer's latest audit report or certified financial statement, or a statement as to why no report statement is available.

c. Proposed Approach

The Agency's assumptions in Section III of this RFP describe what the Agency believes are the means to achieving the Agency's goals and objectives. Proposers may also propose more than one approach. However, if an alternative approach affects other areas of the proposal such as experience, organizational capability or price, that alternative approach should be submitted as a complete and separate proposal providing all the information specified in Section IV of this RFP.

Describe in detail how the proposer will provide the work described in Section III of this RFP and demonstrate that the proposer's proposed approach will fulfill the Agency's goals and objectives.

1. Project Management

- Detailed description of plan to complete the work in accordance with the time performance requirements of the RFP, identifying principle schedule milestones.
- A comprehensive list of tasks required to complete the scope of work proposed, with estimated effort (expressed in persons, identified by skill set, and hours) required for each task.
- A detailed written description of how the proposer intends to accomplish each task;
- The name of key personnel identified in the Organizational Capacity section (part b, above) who will be assigned to complete each task.
- The approximate amount of time each day that each of the key personnel identified in the Organizational Capacity section will spend on the project (e.g. Project Director will spend approximately 25 percent of his/her time during Step 1 of the project).
- All assumptions relied upon to develop the work plan and estimate and all conditions for its fulfillment as proposed, with specific emphasis on the Agency's responsibilities.
- Demonstrate proposer's compliance with all applicable City, State and federal secrecy and confidentiality provisions.
- Any other management approach or process that the proposer will use to ensure that the project plan can be completed as proposed.

2. Technology

- All computer hardware, communications equipment, network equipment, and other equipment required for the software system proposed, with detailed specifications for each.
- Reasons for selection of hardware and software environment, if applicable.
- Topology and infrastructure diagrams defining the proposed technology components, functionality and business components, and end-user components, as well as the interrelationships and integrations of all these components.
- The software architecture of the proposed solution (i.e., two-tier or three-tier environment, etc.), including a detailed justification for the architecture selected, a detailed description of the software application, tool or other component proposed for architectural functions, tasks and outputs.
- Workflow processing plan that defines the solution with respect to process definition and workflow API and interchange.
- Reporting infrastructure proposed to handle predefined and ad hoc reports.
- Archiving and auditing plan to address the business requirements.
- Logistical and installation support plan for deployment of the application. This includes details on software items installed on desktops, remote devices, and servers.
- Outline of technical expertise needed by the Agency for future support of the proposed system.
- Outline of the disaster recovery plan for supporting the proposed system.

- Anticipated bandwidth requirements.
- Network issues such as latency, peak and non-peak performance, network congestion, packet size, and other performance factors.
- Performance standards for the software system proposed, including, but not limited to, the following system functions, taking into account all network, desktop and remote equipment specifications or technical characteristics, and all assumptions regarding the number of concurrent users and their levels of access, number of transactions and size of databases:
  - Server disk input/output (I/O)
  - Transactions per minute (TPM)
  - Page swapping
  - Response time
  - Throughput
  - Performance assumptions
  - System availability expressed in “mean time to failure” and “mean time to repair”
  - Bandwidth utilization, expressed in bytes per second required by the system under all anticipated load conditions
- Any other technical approach or process that the proposer will use to ensure that the system and subsystems will be fully operational as proposed.

3. Data Conversion, Development, and Testing

The proposer should discuss their plans for data conversion, development, and testing.

See Appendix D – Sections 3.4 to 3.9 (Statement of Work and Detailed Technical Requirements) and Section 8 (Data Conversion Requirements) for detailed description of these tasks.

4. Training

The proposer should provide a curriculum for Technical/Operational training and End User training. Training of Agency staff will be completed directly on-site at the Agency facilities. The proposer must include the training materials as part of the price proposal. Training materials must be made available in electronic format.

- System Technical/Operational Training:
  The proposer should provide a training curriculum and a training plan for Agency technical staff to support and maintain the CAMA system. This includes training on the design, architecture, management, maintenance, and operation of the system and the associated databases, software objects, system management facilities, and development tools. Training materials and documentation should be provided as a part of the technical training incorporating the base product and any customizations.

Proposer should clearly state any prerequisites for the training, including software version numbers, to ensure that the Agency is properly prepared for training.

- End-User Training:
  The proposer will take responsibility for all eEnd-user Training. End-user Training will consist of a complete curriculum for training end users that integrates system use and revised policies and procedures. Training materials and documentation should be provided as part of this training.

5. Support and Maintenance

See Section III(B)(6-8) of this RFP.

3. Price Proposal

The Agency reserves the right to select any payment structure that is in the City's best interest. For the purposes of comparison, proposers should submit a Price Proposal that meets the standards of Sections IV (3)(a) and IV (3)(b), below.

a. Proposed Price

The Price Proposal should include each of the following for providing the work described in Section III of this RFP:

- The proposed price per unit of service and total offering price in the format prescribed in the Price Proposal Form included in this RFP, which is also available as an Excel workbook by email from the Agency Contact, and prepared pursuant to the instructions attached as Appendix C.
- The proposed rate for each component of the contract's performance-based payment structure proposed in Section IV(3)(b), below.

b. Performance-Based Payment Structure

List and describe proposed performance-based payment components (i.e., specified performance-based outcome measures and related financial incentives and/or disincentives, unit payments tied to outcomes, milestone payments tied to outcomes, and/or liquidated damages tied to outcomes) for providing the work to be performed by the proposer under the contract that could potentially be applied to the contract in whole or part, as a reliable means for measuring and paying for success, as described in Section III of this RFP. The Agency's assumptions regarding performance-based payment structure represent what the Agency believes to be most likely to achieve its goals and objectives. However, proposers are encouraged to propose measures, incentives and disincentives, which they believe will most likely achieve the Agency's goals and objectives in a cost-effective manner. While the proposer's proposed performance-based payment components may not be scored by the Agency's Evaluation Committee, they will be considered by the Agency in awarding the contract and structuring its payments to contractors.

4. Acknowledgment of Addenda

The Acknowledgment of Addenda form (Appendix B) serves as the proposer's acknowledgment of the receipt of addenda to this RFP, which may have been issued by the Agency prior to the Proposal Due Date and Time, as set forth in Section (D), above. The proposer should complete this form as instructed on the form.

B. Proposal Package Contents ("Checklist")

The Proposal Package should contain the following materials. Proposers should utilize this section as a "checklist" to assure completeness prior to submitting their proposal to the Agency.

1. A sealed inner envelope labeled " Technical Proposal," containing one original set and ten (10) duplicate sets of the documents listed below in the following order:

   - Proposal Cover Letter Form (Appendix A)
   - Technical Proposal
   - Technical Environment Questionnaire (Appendix E)
   - References for the Proposer and, if applicable, each Sub-Contractor
   - Resumes and/or Descriptions of Qualifications for Key Staff Positions
   - Organizational Chart
   - Acknowledgement of Addenda (Appendix B)
   - Audit Report or Certified Financial Statement or a statement as to why no report or statement is available
   - Proposer's Certification
   - Proposer's Affidavit
   - Proposer's Qualifications and Representations

2. A separate sealed inner envelope labeled "Price Proposal" containing one (1) original set and ten (10) duplicate sets of the Price Proposal.

   - Price Proposal (Appendix C)
   - Proposed Performance-Based Payment Structure

3. A sealed outer envelope, enclosing the two sealed inner envelopes. The sealed outer envelope should have two labels containing:

- The Proposer’s name and address, the Title and PIN # of this RFP and the name and telephone number of the Proposer’s Contact Person.
- The name, title and address of the Authorized Agency Contact Person.

SECTION V – PROPOSAL EVALUATION AND CONTRACT AWARD PROCEDURES

A. Evaluation Procedures

All proposals accepted by the Agency will be reviewed to determine whether they are responsive or non-responsive to the requisites of this RFP. Proposals that are determined by the Agency to be non-responsive will be rejected. The Agency's Evaluation Committee will evaluate and rate all remaining proposals based on the Evaluation Criteria prescribed below. Although discussions may be conducted with proposers submitting acceptable proposals, the Agency reserves the right to award contracts on the basis of initial proposals received, without discussions; therefore, the proposer's initial proposal should contain its best technical and price terms.

The Agency reserves the right, in its sole discretion and without notice to proposers, to modify this evaluation procedure as it may deem to be in the Agency's interest.

B. Evaluation Criteria

Demonstrated quantity and quality of successful relevant experience	**40%**
Quality of proposed approach	**40%**
Demonstrated level of organizational capability	**20%**

C. Basis for Contract Award.

A contract will be awarded to the responsive and responsible proposer whose proposal is determined to be the most advantageous to the City, taking into consideration the price and such other factors or criteria which are set forth in this RFP. Contract award shall be subject to demonstration that the Contractor will timely complete negotiations and execute a final contract between the Agency and the selected proposer.

SECTION VI - GENERAL INFORMATION TO PROPOSERS

A. Complaints. The New York City Comptroller is charged with the audit of contracts in New York City. Any proposer who believes that there has been unfairness, favoritism or impropriety in the proposal process should inform the Comptroller, Office of Contract Administration, 1 Centre Street, Room 835, New York, NY 10007; the telephone number is (212) 669-3000. In addition, the New York City Department of Investigation should be informed of such complaints at its Investigations Division, 80 Maiden Lane, New York, NY 10038; the telephone number is
(212) 825-5959.

B. Applicable Laws. This Request for Proposals and the resulting contract award(s), if any, unless otherwise stated, are subject to all applicable provisions of New York State Law, the New York City Administrative Code, New York City Charter and New York City Procurement Policy Board (PPB) Rules. A copy of the PPB Rules may be obtained by contacting the PPB at (212) 788-7820.

C. General Contract Provisions. Contracts shall be subject to New York City's general contract provisions, in substantially the form that they appear in "Appendix A—General Provisions Governing Contracts for Consultants, Professional and Technical Services" or, if the Agency utilizes other than the formal Appendix A, in substantially the form that they appear in the Agency's general contract provisions. A copy of the applicable document is available through the Authorized Agency Contact Person.

D. Contract Award. Contract award is subject to each of the following applicable conditions and any others that may apply: New York City Fair Share Criteria; New York City MacBride Principles Law; submission by the proposer of the requisite New York City Department of Business Services/Division of Labor Services Employment Report and certification by that office; submission by the proposer of the requisite VENDEX Questionnaires/Affidavits of No Change and review of the information contained therein by the New York City Department of Investigation; all other required oversight approvals; applicable provisions of federal, state and local laws and executive orders requiring affirmative action and equal employment opportunity; and Section 6-108.1 of the New York City Administrative Code relating to the Local Based Enterprises program and its implementation rules.

E. Proposer Appeal Rights. Pursuant to New York City's Procurement Policy Board Rules, proposers have the right to appeal Agency non-responsiveness determinations and Agency non-responsibility determinations and to protest an Agency's determination regarding the solicitation or award of a contract.

F. Multi-Year Contracts. Multi-year contracts are subject to modification or cancellation if adequate funds are not appropriated to the Agency to support continuation of performance in any City fiscal year succeeding the first fiscal year and/or if the contractor's performance is not satisfactory. The Agency will notify the contractor as soon as is practicable that the funds are, or are not, available for the continuation of the multi-year contract for each succeeding City fiscal year. In the event of cancellation, the contractor will be reimbursed for those costs, if any, which are so provided for in the contract.

G. Prompt Payment Policy. Pursuant to the New York City's Procurement Policy Board Rules, it is the policy of the City to process contract payments efficiently and expeditiously.

H. Prices Irrevocable. Prices proposed by the proposer shall be irrevocable until contract award, unless the proposal is withdrawn. Proposals may only be withdrawn by submitting a written request to the Agency prior to contract award but after the expiration of 90 days after the opening of proposals. This shall not limit the discretion of the Agency to request proposers to revise proposed prices through the submission of best and final offers and/or the conduct of negotiations.

I. Confidential, Proprietary Information or Trade Secrets. Proposers should give specific attention to the identification of those portions of their proposals that they deem to be confidential, proprietary information or trade secrets and provide any justification of why such materials, upon request, should not be disclosed by the City. Such information must be easily separable from the non-confidential sections of the proposal. All information not so identified may be disclosed by the City.

J. RFP Postponement/Cancellation. The Agency reserves the right to postpone or cancel this RFP, in whole or in part, and to reject all proposals.

K. Proposer Costs. Proposers will not be reimbursed for any costs incurred to prepare proposals.

L. Charter Section 312(a) Certification. [IF APPLICABLE]

The Agency has determined that the contract(s) to be awarded through this Request for Proposals will not directly result in the displacement of any New York City employee.

__________________________________ ____________________
(Commissioner) (Agency Chief Contracting Officer) Date

Message from the New York City Vendor Enrollment Center
Get on mailing lists for New York City contract opportunities!
Submit a NYC-FMS Vendor Application - Call 212/857-1680

SECTION VII – TAX SECRECY

(a) Notice of Secrecy Provisions of the Administrative Code of the City of New York (Administrative Code) and the State Tax Law. Contractor, its employees and all subcontractors and their employees shall be made aware of the secrecy provisions of the Administrative Code and the State Tax Law and understand that the existence and the contents of all tax reports and tax returns, or other information covered by such secrecy provisions may not be divulged or made known in any manner to any unauthorized person. Contractor hereby states that it is aware that violation of these secrecy provisions is punishable by a fine not exceeding $10,000 or imprisonment not exceeding one year, or both.

(b) Notice of Secrecy Provisions of Internal Revenue Code. Contractor understands that it and subcontractor's employees are permitted to inspect federal tax information under the provisions of the Internal Revenue Service and the Department for the sharing of tax information. It is further understood that divulgence of federal tax information by Contractor and its employees or subcontractors and their employees is punishable as a felony with a fine in an amount not exceeding $5,000 or imprisonment of not more than five years, or both together, plus the cost of prosecution.

Paragraphs (a) and (b) of this subdivision are intended to give notice to Contractor and its personnel and shall not be deemed to affect or expand the meaning, application or scope of the secrecy provisions therein referred to.

(c) When this project is over, and from time to time before its completion, as the Department may determine, the officers and employees of Contractor who view or otherwise have access to the Confidential Information defined herein shall turn over to the Department all written or computerized records of the Confidential Information it in any form whatsoever, including computer tapes and/or disks.

(d) Employees of Contractor may not re-release or re-disclose confidential administration information, federal tax information, City tax information, State tax information, and confidential tax administration information to other employees of Contractor or Subcontractor(s) not personally and directly engaged in rendering service on this project. Contractor, its employees or Subcontractor(s) and its employees will make no other disclosure except with the prior written approval of the Department.

e) Contractor will require each of its employees assigned to perform system maintenance services hereunder any time during the period of this Agreement to sign a Secrecy Agreement in the form attached hereto as Appendix J, acknowledging his/her understanding of the secrecy provisions of the Administrative Code of New York City and the State Tax Law and the penalties for improper disclosure. The agreements are to be forwarded to the Department with photostatic copies maintained at the premises of Contractor/Subcontractor prior to commencement of this Agreement. Secrecy agreements shall remain in effect for a period of three years following the expiration or termination of this Agreement.

(f) Contractor shall fully cooperate with the Department in defense of any claims brought against the Department by reason of wrongful disclosure of any information attributable to it or its officers, employees and subcontractors.

APPENDIX A - PROPOSAL COVER LETTER

RFP TITLE: Development, Installation and Implementation of a Computer-Assisted Mass Appraisal (CAMA) System for the Department of Finance

PIN #: 836061211598

Proposer:

Name: ______________________________

Address: ______________________________

____

Tax Identification #: ______________________________

Proposer's Contact Person:

Name: ______________________________

Title: ______________________________

Telephone #: ______________________________

Proposer's Authorized Representative:

Name: ______________________________

Title: ______________________________

Signature: ______________________________

Date: ______________________________

APPENDIX B - ACKNOWLEDGEMENT OF ADDENDA

Directions: Complete Part I or Part II, whichever is applicable, and sign your name in Part III.

Part I

Listed below are the dates of issue for each Addendum received in connection with this RFP:

Addendum # 1, Dated ______________________________________, 2006

Addendum # 2, Dated______________________________________, 2006

Addendum # 3, Dated______________________________________, 2006

Addendum # 4, Dated ______________________________________, 2006

Addendum # 5, Dated______________________________________, 2006

Addendum # 6, Dated______________________________________ , 2006

Addendum # 7, Dated______________________________________, 2006

Addendum # 8, Dated ______________________________________, 2006

Addendum # 9, Dated ______________________________________, 2006

Addendum #10, Dated _____________________________________ , 2006

Part II Acknowledgement of No Receipt

__________ No Addendum was received in connection with this RFP

Part III

Proposer's Name: ____

Signature of Authorized Representative: _____________________________________

Date: ______________________________________

APPENDIX C - Instructions for Completing the Price Proposal Form

- Complete pricing sheets that follow instructions.
  - List **all** prices associated with the proposal. The contractor will not be compensated for any contract-related services not listed in the price proposal, except where the Agency requests provision of new services not required under this RFP. This provision does not preclude bundling of services.
  - Proposers may bundle or unbundle services listed in the model pricing sheets, but must in all cases be clear about the relationship of the priced product or service to that described in the model sheet. Do not leave any item blank: If you do not intend to price any item, price it at zero or note that the item is subsumed under another specified item.
  - List all third party hardware, software, services, or other item charges, not directly provided by the proposer, in the price proposal, with a description of the type of charge and an estimate of the amount. These estimates are not binding on the proposer, but are intended to give the Agency an idea of the order of magnitude of pass-throughs.

The model price sheet is available as an Excel workbook from the Agency Contact

APPENDIX D

Statement of Work
And
Detailed Technical Requirements

APPENDIX D - TABLE OF CONTENTS

1 INTRODUCTION

1.1 The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified and experienced vendors for a Computer Assisted Mass Appraisal (CAMA) software solution to assist the Department of Finance in the annual valuation of property. The new system will replace the Department of Finance (”the Agency”) Legacy system. This software solution may be comprised of Commercial-Off-the-Shelf software packages (COTS), custom software packages, or a combination of “off-the-shelf” and custom software.

1.2 Consulting services are to be procured to assist the Agency in achieving its vision of a robust yet flexible property valuation system. These services may include but are not limited to:

- Software installation, personalization, and table-driven customization
- Integration of all data from the existing system
- Implementation support
- End user and system administrator training
- User and technical documentation
- Maintenance and technical support
- Service patches, new releases, and end-user troubleshooting

1.3 Licensing for the database management system and operating system software, and hardware to support the proposed solution may be acquired under the scope of this procurement. However, nothing herein requires the Agency to procure database management software, operating system software, or hardware through the contractor.

1.4 Project Approach: Upon acceptance of the system, it is the Agency’s intent to place the system into production. We are seeking guidance from the contractor, based on past experience, on whether a phased, with customization, or single implementation inclusive of customization would work best for the Agency. Either approach requires extensive testing and end-user start-up training. As part of the overall implementation plan, proposers are requested to comment on their approach to project management and implementation of the proposed solution, suggesting a COTS solution or custom software alternatives, as appropriate.

2 BACKGROUND

2.1 Property Valuation

The Agency currently administers more than one million parcels of real property each year using a Cole Layer Trumble (CLT) application, supported by Tyler Technologies, running in a mainframe environment. The application was originally designed over 15 years ago and has been customized over the years to fit the New York City property landscape.

Currently, the Agency has two separate computer systems that support valuation and assessment administration, and a third for financial accounting, called CAMA, RPAD and FAIRTAX respectively. All three systems run on mainframe technology programmed in COBOL/CICS.

The CAMA system collects property related information and performs valuation calculations. Real Property Assessment Data (RPAD) is the repository for all tax lot data used for assessment and exemption and abatement calculations. RPAD also produces the assessment roll. FAIRTAX is the financial accounting system, originally developed by Andersen Consulting and subsequently customized over the last 15 years.

RPAD interfaces with the existing CAMA system through customized applications developed over the life of the application. FAIRTAX does not have any direct interfaces with CAMA, although (Real Estate of Utility Companies) REUC equipment appraisal is maintained in FAIRTAX. The new CAMA application would be capable of interfacing with RPAD and would be flexible to integrate with future versions of RPAD and FAIRTAX.

2.2 New York City Property Landscape

New York City values all properties annually. The City's fiscal year runs from July 1 through June 30. The taxable status date for property values is January 5. The final assessment roll is published on May 25.

New York City is comprised of five boroughs: Manhattan, Bronx, Brooklyn, Queens and Staten Island. The five boroughs encompass over one million parcels. New York City is unique because of its breadth of property types, tax classes, building classes and complexity in valuation methods. Some of the 100+ building types include: light industry, heavy industry, theaters, hotels, office towers, condominiums, cooperatives, regulated housing, and rentals, to name a few.

The very unique aspects of New York City properties are the mixing of property types. For example, a condominium development could contain a cooperative, hotel, movie theater and a shopping mall. New York City also has special considerations for valuing Real Estate of Utility Companies (REUC), air rights, lots, subterranean lots, easements, and multiple buildings within one parcel number.

In order to value these various types of properties, the Agency uses three methods to value and model different types of properties: Income and Expense Analysis, Cost Trend Analysis and Sales Analysis. Each method contains multiple variations depending on the property type.

3 TASKS AND DELIVERABLES

This section details the specific tasks and deliverables that the contractor would be required to perform during the project. The following table summarizes the tasks and associated deliverables detailed in Sections 3.1 through 3.12:

Task	**Task Description**	**Deliverables**
Task1	Manage the Project (Section 3.1)	
Task 2	Attend Status Meetings (Section 3.2)	1. Weekly Status Reports
Task 3	Maintain Work Plan (Section 3.3)	1. Updated Work Plans
Task 4	Install and Certify Base Software (Section 3.4)	1. Installed Base Software 2. Certified Output from Installation Test Plans
Task 5	Customization Review (Section 3.5)	1. Customization Response (includes Program Specifications) 2. Work Plan for Software Customization
Task 6	Modify and Install Customized Software (Section 3.6)	1. Customized Software 2. Customized Installation Test Plan
Task 7	Interface Assistance (Section 3.7)	1. Proposal for software modifications and/or services related to interface requirements.
Task 8	Data Conversion (Section 3.8)	1. Proposal for software modifications and/or services related to conversion requirements (see Section 3.8). 2. Conversion Plan and assistance.
Task 9	Conduct Tests (Section 3.9)	
Task 10	Provide and Update Documentation (Section 3.10)	1. Base Product Documentation 2. Customized Product Documentation 3. Documentation of City-Specific Changes
Task 11	Provide Training (Section 3.11; Section 9)	1. Training Plan 2. Customized Product Technical/Operational Training 3. Customized Product Functional Training 4. Customized Product Training Materials
Task 12	Implementation Assistance (Section 3.12)	1. Proposal for software modifications and/or services related to implementation requirements.

3.1 Manage the Project

The success of the 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. Unless specified otherwise, deliverables and reports associated with the project will be delivered to the project management team. The project management team will be responsible for the review and acceptance of the deliverables and reports. The project management team will work with the contractor to set a schedule for deliverables and an acceptable review and comment period. Any item provided to the Agency that does not meet these standards will be rejected.

3.2 Attend Status Meetings

The contractor would be required to meet on a weekly basis with the project management team. Meetings are either on-site at the Agency or via telephone, as determined by the project management team. The weekly meetings are an opportunity to review progress and to take corrective action when required. The contractor should propose a detailed plan for addressing this requirement.

3.3 Maintain Work Plan

Upon contract award, the project management team will review the project schedule with the contractor. The work plan will be reviewed and revised as necessary. A detailed and updated work plan is the first deliverable.

3.4 Install and Certify Base Software

The contractor would install and 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 contractor would review the installation and testing procedures with the project management team. The contractor would also deliver technical and user documentation associated with the software. The contractor would provide the Agency 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 the Agency internal use.

3.5 Customization Review

Customization may be required to implement business functions that are either legally mandated or are required by the Agency.

The Agency recognizes, however, that new requirements may arise during the course of the project based on changes in business rules or some other event. In some cases, the Agency will implement the necessary solution. For example, the Agency staff may develop reports. In other cases, however, the Agency may choose to contract with the contractor for additional modifications.

The Agency project management team will conduct an on-site, customization review in conjunction with the contractor.

The contractor would be required to prepare a written disposition addressing each requirement that requires customization. The response would 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 Agency-specific modifications in order to facilitate re-application of the modifications in the future
- Program specifications (the Agency would approve the format of the design document)
- Provide 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, the Agency may, at its sole discretion, choose not to implement some of the modifications proposed. The Agency expects a credit for these hours that may be used for new requirements as the project progresses and any credits apply to the new requirements.

There are two deliverables from the Customization Review task:

- The first deliverable of this task would be a document containing the contractor's response to each of the customization requirements. The contractor would be responsible for conducting on-site design reviews (walkthroughs) for the purpose of validating proposed modifications. The project management team would track each response, noting which are approved and which need additional effort. This deliverable would be considered complete when the project management team has reviewed and approved the contractor's response in total.

- The second deliverable would be an integrated work plan, prepared by the contractor, for implementing the base and customization requirements. The work plan would be considered complete when approved by the project management team and after it has been incorporated in the overall project plan.

3.6 Modify And Install Customized Software

Upon receiving approval from the Agency, the contractor would modify the base software in accordance with the program specifications and the approved work plan. The contractor would be responsible for making the changes and ensuring their successful installation at the Agency.

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

3.7 Interface Assistance

Interface requirements are detailed later in this RFP. The contractor would be required to implement the required interfaces to the extent of providing information in the form and format required by other application systems. The Agency would contract with the contractor to develop or assist in the needed interfaces.

3.8 Conversion Assistance

Conversion requirements are detailed later in this RFP. The contractor would be responsible for conversion of data from the current CAMA system to the new CAMA solution. See Section 8 (Data Conversion) for additional details in this Appendix.

3.9 Conduct Tests

The Agency 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 cutover. The following considerations and responsibilities apply.

3.9.1 Installation Test

The contractor would validate successful installation of the base software product by demonstrating that required functional specifications have been met.

3.9.2 Test Plan

Each set of modifications to be developed by the contractor would be accompanied by a test plan prepared by the contractor. The test plan would identify the means by which the correct operation of the modifications can be validated. Program specifications are to be accompanied by a test plan or they will not be accepted by the Agency.

3.9.3 Unit Testing

The contractor would make changes to the base software in accordance with the project management team's approved program specifications and test procedures. The contractor would test programs and insure that they function in accordance with the test criteria. Upon successful unit testing, the contractor would retain the test results and provide a copy to the project management team.

3.9.4 System Test

The contractor would be responsible for system testing. The system test would validate the correct operation of a set of modifications to the product. It will also verify that there were no unanticipated side effects to the system. In performing a system test, contractor would exercise the installation test plan as modified. Records of the system test would be retained and a copy provided to the project management team.

3.9.5 Acceptance Test

A proposed acceptance test plan should be submitted with the proposal. The contractor should prepare a final acceptance test plan for approval of the project management team. The final acceptance test would be conducted prior to production cutover and in accordance with the test plan. The final acceptance test would exercise all functionality, interfaces, and integration components. To this end, the new system would be loaded with actual data from the current systems.

Failure of contractor to satisfactorily address problems arising during the final acceptance test in the specified period would result in withholding of final payment to the contractor. Acceptance of the new system will be at the sole discretion of the Agency.

3.9.6 Problem Resolution

The contractor should 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.

3.10 Provide and Update Documentation: The contractor should provide, at a minimum three (3) types of written documentation in an editable format:

- COTS and/or Custom Software Product Technical Documentation
- COTS and/or Custom Software Product Operation Documentation
- COTS and/or Custom Software Product User Documentation

The Product Technical Documentation should describe the technical architecture of the 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 the Agency technical staff to maintain the system, develop custom programs and reports, and change the programs when necessary.

The Product Operation Documentation should describe the steps and procedures needed to operate the 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.

The Product User Documentation should describe the operation of the 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 contractor would be responsible for developing procedural manuals for the Agency's internal use.

The product may change as the result of customization, integration, and interface efforts. The contractor would be responsible for updating the 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 contractor would identify and ensure that any Agency -specific changes are properly annotated to facilitate re-application when the next release of the documentation is distributed. The contractor should make an effort to consolidate Agency -specific changes to ease the upgrade to future releases. The deliverable from this task is the modified documentation and a document identifying DOF-specific documentation sections.

3.11 Provide Training

The deliverables related to this task include:

- A training plan approved by the project management team
- System Technical/Operational Training for the base product and customized product
- System End User Training.

- Training materials for the base product and customized product.

3.12 Implementation Assistance

The contractor would provide the Agency with onsite implementation assistance. Implementation assistance may be composed of, but not limited to, the following activities:

- Control Table Maintenance: The contractor would load all control tables (e.g., property characteristic codes, etc.) and instruct the Agency on table maintenance.
- Security: The contractor would provide assistance in defining security requirements and establishing security table rules that implement the requirements.
- Technical Support: The contractor would work with the project management team during the project and in particular, the first few months of live operation. Day-to-day operations would be reviewed very closely so that system performance problems can be identified and resolved. The contractor would help suggest various ways to adjust system parameters to improve performance.

4 CONSULTING SERVICES

4.1 Relationship between the contractor and the Agency

The Agency and its project management team will have ultimate decision making authority regarding all aspects of the new system. It should be clearly understood that the role of the contractor would be to develop and implement a detailed project plan and implementation schedule in conjunction with the Agency and its project management team. This detailed project plan and implementation schedule refers to the installation of the contractor’s products and to the integration of their products with the complete system. The contractor would perform installation(s) and systems integration tasks.

The Agency would work with the contractor to insure that the software solution meets the Agency’s business requirements. The Agency would also review the Agency’s internal business processes and consider modifications, as appropriate, to best achieve the most efficient and highest quality final product possible.

The contractor's staff would be available for consultation with DOF staff on an as needed basis between 9:00 a.m. and 5:00 p.m., Monday through Friday (Eastern Time).

5 OTHER SERVICES

5.1 Evaluation and Quality Control

The contractor would establish formal evaluation and quality control procedures to monitor each facet of the final contract. The evaluation and quality control procedures would provide sufficient information to allow the Agency's project management team to monitor the program's progress and effectiveness. The Agency's project management team will use the quality control report to evaluate the effectiveness of the program on a monthly basis. The contractor would submit a quality control report to the project management team.

6 FUNCTIONAL REQUIREMENTS

6.1 Functional Overview

The Agency would like to obtain the following benefits from the new system:

- Flexible modeling parameters and data set manipulation.
- User-friendly GUI front-end that facilitates intuitive navigation
- Present a uniform look and feel across the entire system
- High data throughput and fast system response times while supporting 150+ simultaneous users
- Support expansion capabilities to interface with new systems and emerging technologies

The Agency desires the CAMA system to be consistent with professional appraisal standards such as those promulgated by the International Association of Assessing Officers (IAAO) and the New York State Assessor's Association.

More importantly, the system would comply with the statutes of the State of New York regarding property valuation and provide the flexibility to adapt to changing business rules and new standards in a timely fashion.

6.2 Functional Specifications

This section defines the specific Agency valuation system specifications for the new CAMA system. The contractor would design a system that encompasses all of these specifications.

6.3 Required System Level Functions

	Support Numeric Data Sizes
1	Support property values in records up to $999,999,999,999.
2	Support property records up to 999,999,999.

3	Support 10/11 digit Borough-Block-Lot unique identifier format: x-xxxxx-xxxx-e, where e is an optional easement classification (alpha). Flexibility for changing identifying keys are preferred.
4	Support condominium, cooperative and Real Estate of Utility Company (REUC) keys
5	**Provide Reference Tables and Support Table-Driven Editing**
	Provide Flexibility
6	Provide flexibility to adapt to changing business rules, including documentation on how to create and modify business rules.
7	Support user edits to handle special processing needs or rules.
	Provide Security & Audit Controls
8	Provide table-driven security processing. Security scheme should allow for a separation of access to functions including, but not limited to user id, location, transaction, tax class, etc.
9	Provide security at the screen / transaction level.
10	Provide security at the field level. Allow users to specify, via reference tables, the fields requiring security and allowable values.
11	Support automatic workstation time-out (e.g., password must be re-entered).
12	Produce security violation reports.
13	Produce audit reports.
	Maintain Transaction History / Change Information
14	Capture transaction history (i.e., transaction name, user id, date, time, and reason) and change information (i.e., before and after data, effective assessment year) for all additions, changes, and deletions.
15	Support on-line viewing of change information for transactions.
16	Provide offline reports for transaction history / change information. Reports should have selection and sort options.
	Support Archiving
17	Provide the ability to access historical records without impacting current records and system response times.
18	Provide the ability to "delete" and restore property records.
19	Produce reports of historical records.
	Support Database Technology
20	Support real-time updates to all database items.
21	Run on-line programs in batch mode to mass load data into the system with full editing.
22	Run multiple versions of system on either same or different server with complete independence of software and database (to support concurrent conversion, testing, training, and production activities). [Staging/Testing]
23	Run reports while the on-line system is in use.
24	Support incremental versioning of data.
25	Run backups while the on-line system is in use.
26	Run offline update jobs while the on-line system is in use.
	Provide Workstation User Interface
27	Provide a graphical user interface (GUI) for all functions including maintenance of reference data.
28	Provide a graphical user interface (GUI) for system management (e.g., database management, operating system management, and software distribution management) functions.
29	Product(s) must support Oracle (preferred), Java (preferred) and Microsoft standards.

30	Print information displayed on on-line screens directly from the application in a printer friendly version.
31	Run system software from a file server (e.g., no need to install system software on each user workstation).
32	Provide a summary screen that displays prominent characteristics about a selected property. “Dashboard”
	System Performance
33	Benchmark Performance statistics: Simple queries must not exceed three (3) seconds in 95% of transactions and in more complex interactions five (5) seconds in 99% of transactions
34	Vendor must state the required server(s), database engine, server platform (processor(s) type and speed, RAM, hard drive speed and size, graphics card, etc.), and network Ethernet speed ("Fast" Ethernet, Gigabit Ethernet, etc.) configuration to provide the required response time. Assume a minimum of 1,000,000+ parcels, at least 10 years of historic data, and all users exercising average product functionality. Applications that will be running on the client workstation concurrent to the product include Windows 2000 or XP and Internet Explorer in addition to other City standard applications. (MS Office Suite) The current network is 10/100 Ethernet and the protocol is TCP/IP.
35	Support 150+ simultaneous users.
36	Vendor must identify any long running batch jobs that exceed a 3-hour batch window (Mondays through Fridays) or which exceed a 6-hour batch window on weekends (e.g.: mass valuation). Batch jobs must be able to execute in the available batch window.
	Provide On-line Help
37	Support comprehensive context sensitive on-line help for all screens.
38	Support on-line system manuals including a table of contents and search capability.
39	Support customization of on-line help with local procedures and editing instructions without having to modify system programs.
40	Provide access to a help desk for user inquiries during normal business hours (9:00 A.M. to 5:00 P.M., Eastern Time).
41	Provide access to help information without exiting the active transaction.
	Provide User Defined Fields
42	Provide user defined fields. Specify the number of user-defined fields provided.
43	Support edit and processing rules for user defined fields.
44	Support range check editing for numeric user defined fields.

6.4 Parcel Maintenance Functions

	Parcel Maintenance
45	Maintain legal description of property. Support unlimited field size to fully capture any legal description without truncation.
46	Store edited code values and maintain textual descriptions for items including, but not limited to: - land use codes - building type codes - tax classes - zoning codes - census tract codes - other user defined identifiers
47	Maintain apportioned and merged lot references to original parcels.
48	
	Access Data by Index Information

49	Find property by physical address.
50	Provide a "walk down the street" view of property records and allow scrolling from property to property, displaying identifying information such as address, map reference number, future photographs linked to property map reference numbers, etc.
51	Support 10/11 digit Borough-Block-Lot unique identifier format: x-xxxxx-xxxx-e, where e is an optional easement classification (alpha). Flexibility for changing identifying keys are preferred.
52	Support condominium, cooperative and Real Estate of Utility Company (REUC) keys
53	Look up property by additional user-defined identifiers.
54	Look up property by GIS map reference.
55	Support capability of parcels containing multiple addresses.
	Process Property Valuation
56	Support on-line mass appraisal to value multiple properties at the same time. For example: by building type, designated area, property type, user defined group, or combination of attributes, etc.
57	Support valuation of individual properties and changes to valuations by type (e.g. equalization, new construction, alteration, etc.)
58	Store original valuations, revised valuations, assessor, date, and valuation methodology used for both land and improvement.
59	Provide "supervisor review required" option to control property valuations for individual and mass appraisals.
60	Provide supervisor review required and administrator review required functionality.
	Process Supplemental Valuations
61	Support multiple valuations in any year for new construction, correction of errors, alterations, etc.
62	Store dates associated with supplemental valuations and provide the capability to perform daily pro-ration of values based on a percent complete of alterations on a particular date.
63	Associate a reason (literal description) with all supplemental valuations.
64	Allow multiple supplemental valuations for a parcel in the same year and for prior years. Provide prior years' tracking.
	Provide Rolling Valuation Process
65	Provide ability to generate "test" property values for any given fiscal year.
	Provide ability to generate "test" property values to perform quality assurance prior to tentative and final assessment roll.
66	Allow parent record to be bypassed when all sibling records in the current year's file are being valued. (Condominiums)
67	Provide ability to "freeze" real estate values when processing value to create the new year property file.
	Review Reports/Inquiries
68	Provide a report showing valuation changes from current year to prior year by study group.
69	Produce reports measuring changes to the valuation base from the prior year on a variety of levels (e.g., Citywide, designated area, building type, study group, etc.)
70	Access comparable sales and comparable unsold properties on-line based upon individual criteria.
71	Provide the ability to display the subject property and at least three sales of uniformity comparables on a grid sheet to allow easy comparison and adjustments to be applied between the comparables and subject.
72	Provide the ability to display the subject property and at least three income and expense comparables on a grid sheet to allow easy comparison and adjustments to be applied between the comparables and subject.

73	Provide the ability to display the subject property and at least three cost based comparables on a grid sheet to allow easy comparison and adjustments to be applied between the comparables and subject.
74	Display values divided into categories of land, physical improvements, building improvements, and totals for multiple years.
75	Display on a single screen the values for land, improvements, and total for a parcel across multiple years. Three years minimum.
76	Display on-line property totals by property tax class, building type, and year.

6.5 Valuation Requirements

The contractor's product(s) should support the classification of property types and the appraisal of property using cost, sales comparison, and income approaches.

The system would classify property types and generate the appraisal of property using cost, sales comparison, and income approaches.

	Provide Basic Valuation Functions
77	Support and process valuation for New York City's four property classes: • Class 1 – Residential property up to three units, vacant residential land, and condominiums of not more than three stories. • Class 2 – All other primarily residential property. • Class 3 – Utility Company equipment (REUC). • Class 4 – All other property.
78	Support standard approaches for property valuation for residential and commercial properties:
79	Cost approach.
80	Income and expense for both commercial and residential properties.
81	Sales Comparison approach, including multiple regression analysis.
82	Sales trend (trending of prior year land, building and/or total valuations).
83	Support study group codes for parcel classification (literal description/name preferred).
84	Allow valuation methods to be saved for re-use with similar study group.
85	Support on-line and printed standard valuation statistical analyses including sales ratios, coefficient of dispersion, standard deviation, price-related differential and other tests of the level and equity of valuations. The system must allow the results to be arrayed and plotted graphically. Allow the user to specify the records, variables, and types of analysis needed. Provide instant on-line recalculation of statistics during "what-if" analysis (e.g., change study group from Cost approach to Sales Comparison approach, appraise one building type by Cost and another building type Sales, etc.).
86	Support data updates for single parcel groups (e.g. within neighborhood or study group).
87	Support mass valuation by designated area, building type, zoning, a user specified list of parcels, by property type, or sub-class.
88	Support separate valuation approaches, methods, and techniques for each class of property.
89	Maintain identification of dwelling type for residential properties (e.g., single family homes, cooperatives, and condominiums) and support appraisal analysis at the building type level.
90	Support year-based and categorized property notes, including designated area-level notes to convey information to future appraisers.
91	Allow properties or groups of properties to be valued and revalued using different approaches, methods, and techniques during each year. Document each change.

92	Store valuation method used, total percentage change, total money change, reason for change, and comparable sales/similar properties used to determine the valuation for each property for at least 10 years.
93	Support on-line valuation of current and at least 10 prior years.
94	Record and save changes for the current and 10 prior years: access and change historical data including multiple valuations each year, sales and property characteristics information.
95	Maintain a history of property zoning, including variances.
96	Allow direct entry of total area measurement (e.g., an irregularly shaped structure where only the total size is known. The dimensions are unknown).
97	Support and improvement valuations separately.
	Capture Property Characteristics
98	Provide formatted and edited fields for entry of property characteristics, including a specific field or fields to identify alterations.
99	Flag properties that need to be reviewed and/or updated as a result of changes made to property characteristics.
100	View and update all property characteristics on-line.
101	Allow each section of a house/building to be described (including % complete) and valued separately.
102	Maintain square footage, type of basement, and type of finish for basements.
103	Maintain square footage and type of finish for attics, dormers, and half story areas.
104	Support separate property descriptions for outbuildings and improvements.
105	Provide the ability to fully describe all levels of split level, multiple level, 2-story ceiling heights, atriums, etc.
106	Provide the ability to list the percentage complete and value attributable to each part of a building that is less than 100% complete.
107	Store cost-based appraisal rates for common outbuildings. Identify outbuildings that do not have a rate or flat value associated with them and allow user-defined rates to be input to the cost tables.
108	Allow a variable and expandable number of lines to record property dimensions for even the most complex structures or provide automatic calculation of total building area from the property sketch.
109	Support copying property characteristics from one parcel to another or to a group of parcels.
110	Value land by various measures including, but not limited to, acreage, square foot, floor area ratio, site (utilize user defined parameters to set values for a specific range of land sizes and types), flat value, lot, front foot, and buildable unit.
111	Allow multiple valuation approaches, methods, and techniques to be applied to different portions of the same parcel (i.e., house versus vacant land). Apply selected percentage and/or flat value adjustments for land value affecting features at the individual parcel, block, and designated area levels.
112	Support adjustments for easements, land size, and other property features and allow valuation via user defined rates.
113	Support location of property as a factor for valuation.
114	Support multiple parcels (BBL) per building.
115	Support multiple buildings and/or properties per parcel. (BBL)
	Store Non-Residential Property Information
116	Support storage of information for all non-residential properties.
117	Store on-line four years of vacancy and collection loss figures, rental figures, pass- throughs, and other designated area rental information by property type.
118	Store data provided by taxpayers on appraisal surveys. For example, interior characteristics for improved structures.
119	Track historical income and expense data.
120	Store on-line a minimum of the current year plus the previous four years of income and expense data. 10 years worth of data is the goal.

121	Store rent data information.
122	Value specific types of non-residential properties using the appropriate approaches.
123	Add, insert, delete, and selectively update tenant data to perform lease analysis on stored tenant data.
124	Capture tenant leasable area, lease date, expenses paid by tenant(s), contract rent, and economic rent.
125	Support discounted cash-flow analysis to validate / test direct capitalization data.
126	Support lease analysis capability to validate / test direct capitalization data.
	Value Using Cost Approach
127	Provide a cost estimate for all building dimensions and features recorded for a property description. Support the cost approach for multiple buildings on a single parcel. During revaluation, allow the improvement value obtained from the cost approach to be adjusted by positive or negative percentages and/or flat values to better reflect the market (a "Market Adjusted Cost" approach to value). Provide flexibility to apply the adjusted cost approach to individual properties, groups of property types, whole designated areas or groups of designated areas, and/or other user-specified criteria.
128	Allow assessors to manipulate and override cost data and factors including depreciation factors, class, class adjustment, and land values to reflect local market conditions.
129	Automatically update property depreciation when the effective age of a building section is changed. Have effective age change as the property depreciation changes (e.g., normal property depreciation is 10% and effective age is set at 12% to represent 20% greater depreciation. This relationship would be automatically maintained as the property ages and normal depreciation continues to increase).
130	Support cost tables for fixtures such as toilets, bathroom sinks, bathtubs, bathtub/shower combinations, showers, kitchen sinks, laundry sinks, water heaters, floor tiles by type (ceramic, glazed, cement, and terrazzo).
131	Support the annual Marshall & Swift replacement cost system with depreciation tables.
132	Allow cost tables to be calibrated by assessors and support interpolation between areas in cost tables. Provide these tables on-line for viewing and use. Maintain tables for current and at least prior four years for on-line use.
133	Provide flexibility for assessors to specify special features when the standard cost approach does not work for a certain component.
134	Determine cost and depreciation through sales analysis.
135	Flag properties for review where major departures from guidelines or cost table standards have occurred.
136	Calculate functional and external obsolescence by percentage and money amounts.
	Value Using Sales Trend Approach
137	Calculate and store property specific and study group specific trending factors. Support user-entered trend factors to value similar properties (e.g., tax class, building type, age, etc.).
138	Support trending for improvement value only.
139	Support trending for land value only.
140	Support trending for total property value (i.e., land and improvements).
141	Support use of a verified sale after a parcel has been subdivided (a sale that occurred prior to an apportionment or merger remains useful in sales comparison approach).
142	Support use of a verified land sale after a property has been improved.
143	Capture sale verification process, to include the market value-to-sale price ratio, identified comparable sales, confirm the sale, track sale-related remarks and use units of comparison such as properties such as a $/sq. foot improvement area, $/room on hotels, sale per unit on apartments, $/lot, and $/leasable area.
144	Store sales verification information including tracking of remarks, listing the individual who provided the information, scanned images, documents, sketches, maps, tabular data, and other exhibits.

	Value Using Sales Comparison Approach
145	Support matched-pair analysis for residential properties to determine the value of an individual property component.
146	Utilize comparable sales in application of the sales comparison approach.
147	Support Multiple Regression Analysis (MRA), including linear regression analysis (LRA).
148	Allow assessors to specify and store model variables and statistical options for MRA and LRA valuation and provide a history of model changes.
	Value Using Income Approach
149	Support a table driven mass valuation process with user override capability.
150	Store non-residential sales data to determine the direct capitalization rates for income analysis valuation.
151	Support the calculation of functional and external obsolescence by percentage and in dollars.
152	Support valuation of income producing properties using direct capitalization.
153	Value all non-residential property types using multiple approaches, methods, and techniques.
154	Support valuation using income and expense information.
155	Support valuation by the valuation unit concept (e.g., where multiple parcels support one building, or multiple buildings sit on one parcel, or multiple buildings sit on multiple parcels and have different property types that require varying approaches to value).
156	Support valuation using rent and tenant data based on lease analysis of actual tenants.
157	Support valuation using vacancy information for various markets and sub-markets.
158	Support assessor override capability for income, expenses, and vacancy when evaluating specific properties.
	Support Property Sketches/Sketching
159	Support a five years of on-line sketch history, and allow sketches to be changed multiple times during the year.
160	Record detailed physical characteristics for a property, with the ability to describe and sketch each building on a property separately, including detached structures such as garages and sheds and the labeling of these structures.
161	Support the ability to copy sketches from one parcel to another.
162	Import / utilize property sketches from GIS building footprint geographic database. (NYCMap and Digital Tax Map Projects)
	Interface with the Department of Building's Building Information System (BIS) and Department of Finance Digital Tax Map for lot and permit information.
163	Store a parcel's detailed construction permit information and view on-line.
164	Print a parcel's permit information.
	Interface with Automated City Register Information System (ACRIS) for Sales and Transfers of Ownership Records
165	Store sales price information and selected sales characteristics for historical reporting and sales analysis valuation, including, at least, two prior ownerships.
166	Provide a "snapshot" of the property as it existed at the time of sale for use in sales analysis. Allow correction of the snapshot if it is later discovered that the record did not correctly describe the property at the time of sale.
167	Retain all information regarding a sale for use in sales analysis even if the parcel is subdivided or otherwise changed from its original configuration at the time of sale. Accommodate multi-parcel sales tracking to identify and account for all parcels involved in a multiple parcel sale.
168	Support access to sales data by user-defined criteria (e.g., improved, vacant, zoning, age, building type, size, etc.)
169	Notify assessors when a user defined "significant" sale occurs in the assessor-assigned area.
170	Automatically calculate market value to sale ratios.

171	Support workflow assignments and supervisory oversight.
	Interface with Department of Finance Real Property Assessment Data (RPAD) for property assessment administration.
172	Collect apportionments, mergers, new parcels and other descriptive data and starting market values for apportionments and mergers.
173	Notify assessors when a pre-defined fields change from data imported from RPAD. Support workflow assignments and supervisory oversight.
	Provide Rolling Valuation Process
174	Create next year parcel records containing values from the most recent assessment roll.
175	Allow assessor staff to update current, prior, and future year records.
176	Copy user-defined parcel characteristics in batch at year-end, based upon user criteria, to new year parcel records.
	Review Reports/Inquiries
177	Print or view on-line property characteristic information for use by assessors in valuing property.
178	Produce on-line sales analysis reports for use by assessors.
179	Produce an on-line comparable sales query and report based on user-defined criteria.
180	Query comparable designated areas and view designated area data either on-line or in a printed report.
181	Support assessors' queries on data including, but not limited to, year of improvement, date built, zoning, and characteristics of improvements and land.
182	Support queries to locate sales in designated areas bordering the subject designated area for both vacant and improved property.
183	Support queries for assessors to view a list of designated areas for which assessor is responsible and the previous assessor assigned to the designated area. List to include all available property characteristics and totals.
184	Provide an on-line search and listing of comparable non-sale properties to check for uniformity.
185	Produce an on-line and printed report of designated area data trends, including sales and comparables.
186	Generate standard on-line and printed reports to satisfy taxpayer requests for sales information.
187	Query rent data for comparables by property type, designated area, age, size, etc.
188	Identify comparable sales through on-line query. Set up adjustment grid for the population and/or benchmark properties.
189	Allow assessors to print and view on-line a list of each designated area for which assessor is responsible. This report should include total parcel count.
190	Generate on-line reports using flexible level breakdown such as designated area, property type, including valuation status of the designated area as well as information such as assessment-to-sale ratio, percent change, number of sales, outliers, etc. for management review.

6.6 Advanced / Emerging Technologies

The Agency is very interested in incorporating advanced technologies with the contractor's product. The Agency believes that the use of these technologies may be appropriate within the new system environment and would like to evaluate and incorporate new technologies when a clear, cost effective benefit can be demonstrated.

In the remainder of this section, a number of advanced and emerging technologies are described. Vendor is requested to address those, and any others, with which they have experience.

6.6.1 Geographic Information System (GIS)

The City is standardizing on the ArcGIS9.x suite of products. The GIS data is distributed to users through a variety of applications including ArcGIS/ ArcView for high end users and a combination of internet/intranet ArcIMS-based applications and fully customized ArcObjects application for lower end users. Data is stored in a combination of shapefiles and personal geodatabases both locally and at the Citywide, enterprise level.

The Agency considers GIS to be an important component of any CAMA system acquisition. The Agency is interested in products that are compatible with the standards listed above and that make GIS an integral part of the property valuation system.

Some questions to consider: How does the proposed system store spatial data, i.e. in files or in RDBMS? Is GIS integral to the system and, if so, how does the system use geospatial technology, beyond simply mapping results? How does the system access external data (including spatial data) and how does it exchange data with other systems (including GIS)?

6.6.2 Internet/Intranet

The Agency currently provides selected real estate valuation information on the Internet. (http://www.nyc.gov/finance) The Agency wishes to utilize the Intranet to provide access to documents and information intended for internal departmental use only. The Agency is interested in continuing and expanding these Internet/Intranet capabilities. The new CAMA system should provide the opportunity to exploit these technologies and provide complete integration with these technologies.

6.6.3 Video Capture / Digital Photography

The Agency is interested in integrating digital property images. The Agency is interested in the contractor's experience converting and integrating digital property images within the products they propose.

6.6.4 Handheld Devices and Wireless

The Agency is evaluating handheld devices and wireless capabilities for use by assessors in the field. The data collected through the handheld devices will be uploaded automatically to the CAMA system, removing the need for a manual data entry process. The Agency is interested in the contractor's experience in integrating handheld devices within the products they propose.

6.7 Reporting

A wide range of reports supports The Agency's business processes. These reports include, but are not limited to:

- Operational reports (e.g., market value to sale ratio, coefficient of dispersion)
- Management reports (equalization, growth, totals, supplemental valuations, permits, valuation modeling, and other reports as needed)
- Productivity reports
- Security reports and Audit reports
- Statutory reports as required
- Other reports as needed

6.8 Technical Environment

The Agency desires solutions with an overall application and technical architecture that can meet current needs and provide a foundation for future growth. Solutions must also meet all current operational and management requirements, including table driven processing under control, Oracle relational database architecture (preferred) with powerful access tools, and a fully graphical environment for ease of use and user acceptance.

6.8.1 Current Systems Architecture

- Mainframe, OS/390, MVS Platform

6.8.2 Current Hardware Environment

- Dell and other Wintel PCs
- 10/100 Ethernet

6.8.3 Desired Environment and System Architectures for CAMA

The Agency desires a N-tier, client/server architecture employing a relational database (Oracle preferred) for the system. The contractor would propose system components that have tightly integrated subsystems, both technically and functionally, and have an architectural foundation that will allow integration of the contractor's product(s) with those that may be provided by other vendors.

A secondary database (data warehouse) should be mentioned. This secondary database would be used for public and external inquiries.

All proposed packages should be based on industry-standard hardware, software, and networking components. Contractor would discuss any noncompliant or proprietary technologies/components required to support the proposed product and architecture.

The following table identifies the Agency's current technologies being used. This table is intended to give the vendor insight into the environments being deployed today and with which the Agency has acquired experience.

Technology / Component	**Products in Use Today**
Local Area Network	MS Windows Server 2000/XP
Workstation operating systems	MS Windows 2000/XP
Databases	DB2, VSAM, ACCESS
Network Protocols	TCP/IP
Ad Hoc Report Tools	MS Access and COBOL, limited Crystal Reports
Web/Internet	CICS CWS Websupport, JAVA, ColdFusion

6.8.4 Application Software - Source Code

The Agency requires that all source code becomes the property of the Agency upon acceptance of the product and completion of the project. During the project, the contractor would update and maintain current versions of source code. Updated source code would also be provided to the Agency by the contractor for any modifications made to the product for Agency-specific requirements and for future releases of the product. Whenever possible, Agency-specific changes should be incorporated into the base product.

6.8.5 Workstation Requirements

The Agency currently utilizes Windows 2000 & XP workstations (all to be upgraded to Windows XP). The proposed products would be capable of coexisting with the Agency's office automation software on a user's workstation. Contractor should state the minimum PC platform requirements (processor type and speed, RAM, hard drive speed and size, etc.) necessary to support the required response times during normal business hours (refer to technical and architectural sections for details). Applications that will be running concurrently include Windows 2000 Office Suite (MS Word, MS Excel, etc.) and other productivity tools. The system will be running on an Ethernet LAN.

More importantly, the contractor should specify the recommended workstation model, memory requirements, monitor size, server, etc. to ensure that the Agency can obtain optimal performance using contractor's products. the Agency's users also require the capability to access GUI-based administrative applications.

The Agency uses Outlook for e-mail services. The contractor should discuss any functionality dependent upon the mail client. Please consider this requirement from both a true end-user client perspective as well as on the database server as a mail client.

6.8.6 GUI (Graphical User Interface) Requirements

The Agency requires a GUI-based system. The system would also provide for navigation utilizing keyboard commands.

6.8.7 On-Line Performance

It is a critical requirement that the contractor's system provide prompt response times for both inquiries and update transactions. The Agency recognizes that it is difficult to guarantee absolute response times without total control over the technical environment. Nevertheless, the Agency would like the range of response times typical of other large jurisdictions and the response times that can be reasonably expected, including those under peak operations documented.

In addition to simple inquiry and update transactions, the system would support complex on-line transactions such as on-line valuation of multiple parcels. The Agency is interested in the range of response times that can be expected with these types of transactions.

The system would be scalable to provide for a linear increase in service capacity through an increase in system resources (i.e. processor quantity, memory and storage capacity) without requiring substantial changes in the system's software.

The system would have the capability to scale the following elements:

- Number of users (both total and simultaneous).
- Number of transactions (both total and simultaneous).
- Size of databases (or records within the databases).
- Amount of network traffic (e.g., number of data packets per time).
- Amount of hardware (e.g., increases in the number of Web servers may require corresponding increases in the number of application servers).

6.8.8 On-line Availability

The system would be available to internal users 24 hours a day should this need arise. For any portion of the CAMA software services needed by other interfacing systems, the CAMA software and databases would be available 24 hours a day, seven days per week with an exception for scheduled maintenance downtime.

6.8.9 Offline Performance / Nightly Update Processing:

The system would be able to accommodate the Agency's nightly update processing needs. The contractor's products would be able to complete the Agency's batch update processing during an overnight time window or provide the capability to process batch jobs while the on-line system is active. The system would be available on-line 24 hours a day should this need arise.

7 INTERFACE REQUIREMENTS

The contractor would be responsible for preparing an interface plan and developing interface programs. This section discusses the scope and complexity of current and future interfaces to be supported.

7.1. Overview of Interfaces

The table below provides an overview of both the current and future planned interfaces for the CAMA system. The "Direction" indicates whether the data is output to or input from the other system. "Source/ Destination" indicates the City Agency and system of the interface. "Type Interface" includes:

- Manual File Transfer- tape, disk file, cartridge or manual input
- Direct - data is available for direct read and write of the source/destination database

"Current/Future" column indicates whether the interface is currently in place or planned for a future implementation. The initial implementation of the valuation system will incorporate only the current interfaces.

Description of Interface	**Direction**	**Source/ Destination**	**Type Interface**	**Current/ Future**
Permit Information	Input from	Department of Building	Manual File Transfer	Current
Sales and Ownership Transfers	Input from	Department of Finance (RPAD)	Manual File Transfer	Current
Property Assessment Administration	Input from and Output to	Department of Finance (RPAD)	Direct Database / Manual File Transfer	Current
Common Property Address Information	Input from	Department of City Planning (GeoSupport)	Direct Database	Current
Income and Expense	Input from	Department of Finance (RPAD)	Manual File Transfer	Current
Tax Maps, Building Footprints, Lot information	Input from	Department of Finance (Digital Tax Map)	Direct Database	Future
Sales and Ownership Transfers	Input from	Department of Finance (ACRIS)	Direct Database	Future
Handheld Devices (Wireless)	Input from and Output to	ArcGIS Server	Direct Database	Future

8 DATA CONVERSION REQUIREMENTS

Data for the existing systems is stored in five basic data VSAM files accounting for nearly 7 gigabytes of data. For each property, there are roughly 1,100 stored fields. There are several more NON-VSAM datasets and libraries that contain source code, programs, procedures, jobs, parameters, etc.

The contractor would be responsible for the data conversion from the current system to the new CAMA system. Contractor should clearly identify tasks that should be the responsibility of DOF staff.

APPENDIX E - Technical Environment Questionnaire

Proposer's Name: ______________________________

Instructions: Complete all relevant items and specify the recommended model, version, and release number for all hardware and software required to provide optimal performance. An electronic version of this form is available from the Agency Contact.

Proposed product(s):
Product Name:
Release Number:
Version:
Date Released:
Number of Installed Sites:

Database management system *(specify vendor names, versions, release numbers, etc.)*
Recommended:
Backup and recovery:
Query tool(s):
Report writer(s):

Server hardware
Production Server (vendor and model):
Quantity of Production Servers Required:
Development Server (vendor and model):
Quantity of Development Servers Required (vendor and model):
CPU (vendor and model):
Processor MHz:
Number of CPUs: Hard disk in GB:
Tape backup size:
Other:

Server Software *(specify vendor names, versions, release numbers, etc.)*
Operating system software:
Backup / recovery software:
Performance monitoring software:
Configuration software:
Printing software:
Other server software:

Sizing estimates for City data
(Estimate hard disk requirements using average property data size. List any assumptions used for the estimate.)
One year's real estate records:

One year's reference data:
One year's photos:
Assumptions:

Application software maintenance requirements
(Specify vendor names, versions, and release numbers.)
Programming languages / compilers:
Development environment software:
Library software:
Debugging software:
Testing utilities:

Workstation requirements
Processor speed:
Memory:
Hard disk for application software:
Optimum monitor size

3rd Party Products:
Other Hardware or Software

PROPOSER'S AFFIDAVIT- APPENDIX F

1. Name and Address of Proposer(s): ______________________________
2. **CHECK ONE BOX AND INCLUDE APPROPRIATE NUMBER:**

A. ______ Individual or Sole Proprietorship*
B. SOCIAL SECURITY NUMBER ___________________________
C. ______ Partnership, Joint Venture, or other unincorporated organization
D. EMPLOYER IDENTIFICATION NUMBER ____________________
E. ______ Corporation
F. EMPLOYER IDENTIFICATION NUMBER _____________________

*Must be signed by an officer or duly authorized representative. Under the Federal Privacy Act the furnishing of Social Security Numbers by Proposers on City contracts is voluntary. Failure to provide a Social Security Number will not result in a proposer's disqualification. Social Security Numbers will be used to identify Proposers or vendors to ensure their compliance with laws, to assist the City in enforcement of laws as well as to provide the City a means of identifying of businesses which seek City contracts.

3. Name, Address and Title of Person Executing This Affidavit _______________________________

4. Subject of Proposal: REQUEST FOR PROPOSALS TO PROVIDE A COMPUTER-ASSISTED MASS APPRAISAL SYSTEM

State of _________________: ss.:County of _______________:THE ABOVE NAMED PROPOSER AFFIRMS, DECLARES, AND CERTIFIES, UNDER THE PENALTIES OF PERJURY:1. That said proposer is the only one interested in this Proposal and that no person, firm or corporation other than hereinabove named has any interest in the contract proposed to be taken. 2. By submission of this Proposal, each Proposer and each person signing on behalf of any Proposer certifies, and in the case of a joint Proposal each party thereto certifies as to its own organization, that to the best knowledge and belief: a. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Proposer or with any competitor; b. Unless otherwise required by law, the prices which have been quoted in this Proposal have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor; c.No attempt has been made or will be made by the Proposer to induce any other person, partnership, or corporation to submit or not to submit a Proposal for the purpose of restricting competition. 3.That no councilman or other officer or employee or person whose salary is payable in whole or in part from the New York City Treasury is directly or indirectly interested in this Proposal, or in the supplies, materials, equipment, work or labor to which it relates, or in any of the profits thereof. 4. That said Proposer is not in arrears to The City of New York or any City agency as defined in The New York City Charter upon debt, contract, or applicable New York City income, excise or other taxes, charges or fees, for every year in which the Proposer has conducted business activities in New York City, and is not a defaulter, as surety or otherwise, upon any obligation to The City of New York, or to any public authority of the State of New York,and is not subject to any unsatisfied judgment or lien obtained by a Federal, State or Local taxing authority, or to any public authority of the State of New York, and has not been declared not responsible, or disqualified by any agency of The City of New York, or to any public authority of the State of New York, nor is there any proceeding pending relating to the responsibility or qualification of the Proposer to receive public contracts except ______________________________. (If none, Proposer will insert "None").

5. THE UNDERSIGNED BEING DULY SWORN DEPOSES AND CERTIFIES UNDER PENALTY OF PERJURY TO THE FOLLOWING:

a. That all applicable City income, excise and other taxes for all years it has conducted business activities in New York City have been paid except*

____
____
____

b. That it has filed all Federal, State and New York City Tax Returns for the past three years, except*

____
____
____

* Additional information or explanation should be provided in the space below.

____

6. Following is a summary of said Proposer's prior business activities in New York City, and a listing of all City tax returns which have been filed in the three (3) years preceding the submission of the proposal:_______________________________

____
____
____

PROPOSER: If the proposer is an individual (s)he must sign and verify this affidavit; if the proposer is a partnership, the affidavit must be signed and certified by one of the partners; if the proposer is a corporation, the affidavit must be signed by an officer of the corporation who must state what office (s)he holds.

PROPOSER:_______________________________

BY:_________________________
Signature of Partner or Corporate Officer
Person signing should give title

ATTEST:(Corporate Seal)

____
Secretary of Corporate Proposer

Sworn to or affirmed before me this _________ day of ____________ ,200_
_________________________________Notary Public

PROPOSER'S QUALIFICATIONS AND REPRESENTATIONS- APPENDIX G

All questions must be answered. Failure to complete this section in detail may result in the rejection of your proposal.

1. Name of Proposer: ____
2. Address: ____

   Telephone____
3. How long have you been in business? ________________________________
4. How long at present address? _____________________________________
5. If incorporated, state date and State of Incorporation: State: _____________

   Date of Incorporation: ____
6. List below names and addresses of all officers, if Corporation:
   NAME HOME ADDRESS TITLE

7. List below names and addresses of all partners, if Partnership:
   NAME HOME ADDRESS TITLE

8. If you are doing business under a trade name, give state and county in which certificate is filed: State: __________________ County __________________
   (If Certificate is filed outside New York City, attach a certified copy of the Certificate).
9. Number of Employees: ____
10. Do you share working premises with any other firm or firms? ________________
    If so give name of the other firm or firms: ______________________________
    ____

11 Have you ever propose on City of New York business under another name? __
If the answer is Yes, list below the name or names: ______________________
____

12. Have you any outstanding proposals for contracts with the City of New York?
If the answer is yes, please list them: _________________________________
____
____

13. Have you any current contract awards from the City? _____________________
If the answer is yes, please list them, including the amount of the award:
____
____

14. Give names and address of three of your largest customers including Federal or any State or City government, or quasi-public corporation:
____
____
____

15. Bank References: ____
____
____
____

The undersigned hereby certifies to the truth and accuracy of all answers contained in this application, and hereby authorizes the Department of Finance to make any necessary examination of the books of account, records and vouchers of the proposer to determine his responsibility.

____
Signature of Applicant

____
Title

State of New York}
County of } ss:. ___________________________

Sworn to before me this____ day of ______________,200_ __________________________________
Notary Public or Commissioner of Deeds