

Union County, NM  
Request for Proposals  
for Public Sector Software and Hardware Services  
RFP #2023-01

The County of Union, NM is requesting competitive sealed proposals for Public Sector Software and Hardware Services for the Union County Assessor's Office. Interested parties may obtain specifications from or submit proposals to Cheryl Garcia, Union County Chief Procurement Officer 200 Court St., Clayton, NM 88415. The proposal packet is available on the County's website at [www.unionnm.us](http://www.unionnm.us) on the home page. Proposals must be sealed and clearly marked "RFP #2023-01 Software and Hardware Services." The County reserves the right to reject any and/or all proposals, to waive any technicalities, and to accept in whole or in part such proposal/s as may be deemed in the best interest of the County. Negotiations as allowed by the State Procurement Code may be pursued. Proposals will be accepted until 4 .m. MST on November 30, 2022. The Union County Board of County Commissioners will award at a later date.



**REQUEST FOR PROPOSALS (RFP)**

**Computer System Software and Hardware**

**RFP #2023-01**

**Released: November 2, 2022**  
**Proposal Due Date: November 30, 2022**

Union County  
Request for Proposals  
Public Sector Software Services  
RFP# 2023-01

Union County is seeking to identify and select a qualified vendor with expertise in software and hardware services to provide comprehensive public sector professional software and hardware system including conversion and implantation services, ongoing training and technical support for the system. This system should include a fully integrated system for the Assessor's Office. Data and image conversion from current system to awarded system. The system must integrate with all other office software for the effectiveness of county operations. It is essential that these programs interface with one another.

Software installation, training, conversion and ongoing support is provided by the awarded vendor. A proven track record of successful implementations, ongoing maintenance and support of customers. Please provide a minimum of 3 references of similar entity size and responsibilities. Union County contracts our IT services and the awarded vendor is required to work closely with the County's IT contractor.

An all inclusive support and maintenance package is preferred to include: software upgrades, enhancements, training on an as needed basis, state mandated changes, reports, bug fixes and troubleshooting for the department.

Union County is requiring a hosted server (database server, application server, web server).

Union County is requiring an itemized monthly invoice for services.

**GENERAL COMPANY DATA**

In a cover letter, Offerors should provide a letter of transmittal which shall include the official name, address and telephone number of the offeror and a statement agreeing to provide all the services and adhere to all requirements, specifications, terms and contract provisions set forth in this proposal. Proposals should be signed by a representative who is legally authorized to bind the offering vendor. Proposals which are substantially incomplete or lack key information may be rejected by Union County. Within the cover letter or the response, the following information must be provided.

1. Describe the organization,
2. Name, address, and telephone number of the Proposer's point of contact.
3. Indicate the type of entity (corporation, partnership, sole proprietorship)
4. Federal Employer Identification Number

## SCOPE OF WORK

1. Software licenses. The functions of the Assessor's Office are specified in Attachment A to this RFP. It is the County's intention that the vendor provide a software license for these functions if available. Proposals should identify which functions are included, and must specifically identify any functions that are not included. Any licenses obtained from third parties must be specifically identified, together with any terms and conditions from the third party provider that are applicable to the county's use of such licenses.
2. Software maintenance.

Enhancements, updates and upgrades. The proposal must specify the maintenance services that are provided for the license, including, but not limited to, enhancements, updates and upgrades, performance improvements, and modifications to comply with legislative and regulatory requirements. Training requirements must be specified. Categories of enhancements that are not included should be identified.

Technical support. The proposal must specify services that are included in the maintenance provisions, including, but not limited to, bug fixes, maintenance of all applicable systems, other technical problems, and availability of service representatives on-line, telephonically and on-site.
3. Hardware. The vendor will install such hardware as is procured pursuant to this agreement, and will program all hardware as necessary for integration into the system. The hosted server must perform a daily backup of all activities.
4. Installation, migration, conversion and implementation. The vendor will need to implement the software. Proposals should describe the vendor's approach to installation, migration, conversion and implementation, including, but not limited to, on-site and off-site services, resources needed, and assistance that will be required from the county.
5. Training. The proposal must contain a detailed description of training that will be provided to the department for software provided. The description should include, but not be limited to, the number of trainers, on-site and off-site services, and time required.
6. Archive services. If archive imaging services are provided, the proposal must describe the procedures to be used, including the personnel of both the vendor and the county that will be required.
7. Schedule. Proposals must contain a detailed schedule for providing all services, starting with the effective date of the contract.

## COMPENSATION AND REIMBURSEMENT

Proposals must specify prices as follows:

### Software License Fees:

Specify price for each separate license, and identify the time period covered by each fee. License fees applicable to licenses obtained from third parties must be identified as such.

### Software Maintenance Fees:

Specify the maintenance fee for each license, and identify the time period covered by the maintenance fee. If maintenance fees cover more than one license, the proposal must specify which licenses are covered.

### Hardware:

Specify purchase price for each product. If leasing is available, specify the lease price for each product and identify the time period covered by the fee.

### Hardware Maintenance Fees:

Specify the maintenance fee for each product, and identify the time period covered by the maintenance fee. If maintenance fees cover more than one product, the proposal must specify which products are covered.

### Installation, Migration, Conversion and Implementation Fees:

Specify fees applicable to installation, migration, conversion and implementation. If fees differ per license, then identify the licenses and the fees applicable to each. If any of these fees is included in the license fee, identify said inclusions.

### Training Fees:

Specify and itemize all categories of training fees, both on-site and off-site as applicable. If training fees depend on the number of trainers, the number of trainees, the number of days necessary per office or per license, then these fees must be separately identified. If any of these fees is included in the license fee, identify said inclusions.

### Archiving of Image to Film Fees:

If the vendor is offering an archiving service, specify the fee per image.

### Additional Fees:

Fees for all services not included in the above-stated categories must be specified on an hourly or other appropriate basis. Travel fees and reimbursable costs must be identified and specified.

Discounts:

If a discount is offered, specify the amount of the discount and the services and products to which it applies.

Escalation:

Specify the increase in prices, if any, for each category of products and services specified herein for all out-years after the first year and all renewal periods.

NOTE: FLAT-RATE MONTHLY FEES SHALL BE DEEMED NON-RESPONSIVE. New Mexico state law requires that local government expenditures be budgeted and approved according to annual costs. All prices must be identified according to the price specifications stated herein. Proposals that specify prices only in terms of a flat-rate monthly fee shall be deemed non-responsive. The county may negotiate payment terms with the successful offeror.

**TERM:**

Multi-term contract. The term of this agreement shall be five (5) years. The agreement may be renewed at the county's sole discretion according to the same terms and conditions for three (3) additional periods of one (1) year each. Funds are available for the first year at the time of contracting. Payment and performance obligations for the succeeding fiscal periods shall be subject to the availability and appropriation of funds therefor.

Determination of need. The purchasing agent has determined, in compliance with the provisions of NMSA 1978, § 13-1-151, that the estimated requirements cover the period of the contract and are reasonably firm and continuing, and that the contract will serve the best interests of the county.

Note: The county reserves the right to terminate this agreement at any time with payment for services and products received up to that time. For that reason, purchase prices and license fees shall not be spread out over periods of more than one year.

**FORM OF CONTRACT**

The contract with the successful vendor will be drafted by the County. Contract forms that are attached by the vendor to the proposal or are submitted in connection with contract negotiations will be considered by the county for inclusion as attachments, and are subject to such revisions as the county deems necessary. Proposals should not simply reference vendor-supplied forms, such as standard license agreements, maintenance agreements, and work orders without explaining the applicability of the provisions contained therein.

Any questions or concerns about this Request for Proposals should be addressed to the Union County Chief Procurement Officer, Cheryl Garcia, at 575-374-8896 ext. 4.

## EVALUATION AND SELECTION PROCESS

Proposals will be opened on November 30, 2022 at 4:00 p.m. and submitted to the Board of Commissioners at a regularly scheduled meeting for approval. Union County reserves the right to accept or reject any and all bids which is in the best interest of the county.

- Depth and breadth of experience and expertise in public sector software systems, most specifically in the areas of State of New Mexico statutes and training in the operation of the software. **( 25 points )**
- Degree of availability for quick response to inquiries that arise out of day-to-day operations, questions, or problems. **( 25 points )**
- Degree to which company and individual stay current through continued professional development and active communication with practitioners in the updates of public sector software field. **( 10 points )**
- Work requirements and system conversion approach.  
Vendor's course and plan of action as indicated to the requirements of this RFP based on their plan of Project Management, Project Scheduling, Training, Ongoing Service Maintenance and Assistance and backup documentation. **( 25 points )**
- Vendor qualifications and references. **( 10 points )**
- Prices for licenses, products and services. **( 25 points )**

The successful company or individual must agree, if awarded a contract as a result of its proposal, to indemnify and hold harmless the County of Union, its officers, agents, and employees from any and all claims and losses accruing or resulting to persons engaged in the work contemplated by its agents in the performance of the work. Prior to commencement of any work, those and other provisions will be established contractually. The contract, to include but not be limited to duties and compensation, will be entered into with the successful company firm or individual and approved by the County Board of Commissioners.

# Attachment A

## Assessor's Functions

Individual property may have multiple classifications allowing for residential and nonresidential property on the same record. For instance, one owner may have a residential home site, residential building (house), nonresidential, miscellaneous land, grazing land, nonresidential improvement, (barn, etc.) and livestock on the same valuation. Each owner may have one up to an unlimited number of properties on one notice of value/tax billing.

The programming for the Assessor's Office should allow for work to be done for either the current year or for the next year. This enables the Assessor's staff to be able to make changes for this year, such as address changes and still be able to make changes for next year, such as a transfer of ownership. The software provider shall work closely with New Mexico Property Tax Division and have knowledge of and be in compliance with the New Mexico Statutes.

The Assessor should have the following:

**Property Owner Maintenance** should allow for the creation, modification or deletion of an owner; as well as allow for changes to address, district, quantities and valuations including centrally assessed owners.

**Property Maintenance** should allow creation, modification or delete a property; allows each owner to have over ten thousand properties and each property over sixty lines of description.

**Transfer of Ownership** should allow the transferring of one or more properties from owner to owner without having to rekey the property description.

**Change Property Code** should allow for the changing of the state geo-code without having to delete or rekey the property description.

**Display taxes in advance should** allow the Assessor to display the tax calculation for taxes to be paid in advance; allows for the owner to be flagged so the Treasurer may then receive the paid in advance amount.

**Alphabetic owner retrieval** should allow for alphabetical retrieval of owners by name or in-care-of name. (would prefer "in care of" to print before name)

**Description retrieval** should allow for the retrieval of owners by section, township, and range; by subdivision, unit and block; street address; Geo code: and by mobile home license number, sticker number, PTD number, last four digits of the serial number or size. Also allows for the Assessor to print the owners which were retrieved.

**Description retrieval print** should allow the printing of all owners with or without the address based on the same selections above.



**Mailing labels** should be able to be generated by subdivisions and/or blocks within the subdivisions; by section, township, and range; and by mobile home size, serial numbers and PTD numbers, calculation classification, and street address.

**Print veteran's list** should allow for the printing of a list of owners who have veteran exemptions.

**Select valuation code** should allow for the printing of a list of owners who have a certain valuation code or within a range of codes; i.e.: grazing land or livestock.

**Print owners** should allow for the printing of a list of all or selected owners (livestock, centrally assessed, finance company) either within a school district or alphabetically.

**Daily maintenance list** should show the type of work done on each one of the owners which has been worked on since the last daily maintenance list.

**Valuation summary** should show the summary by school district for each type of valuation and exemption with totals for the entire county.

**Notice of values** should be in accordance with the State of New Mexico specifications and allow the printing of the customer or office copy of the Notice of Value; also allows the customer copy to be sorted by zip code so it may be mailed at presorted rates. (Reprints must also allowed)

**Print tax schedule** calculates taxes and prints property tax schedule with totals by district and grand totals.

**Field Appraisal Unit** must be integrated with the awarded software.

**State Filing Needs Certification and Abstract**

**Sales Comp** sales comp of sold properties by entry of sales affidavit data

**Building Permits** allows building permit info to be entered into system

**Property Records Cards** print property record cards

**Notes** allows notes to be typed in accounts and appraisals

**Non-rendition Fees** allows for non-rendition fees to be calculated in system

**Current Year and Next Year Maintenance** able to work in both current year and next year

**Personal Property Module** Manufactured Homes (Marshall and Swift Cost Table), Livestock (able to prorate months in County and create pre-bills on a monthly basis), Business Personal Property

**GIS** mapping would be available online

**Website** Web enabled public access (Office documents available to be uploaded or downloaded and property search)

**Image Scans** allows upload of multiple structure pictures for each parcel

**Document Scans** ie: Manufactured Home Titles

**CAMA System** manage the entire property assessment process and required upload to the State. Appraisal values and tax roll values will match with the exception of the 3% cap. Must also stay up to date on ever changing legislation

**Land Table** for specific unit rates

**Transfer of Tax Roll to Treasurer**

**Complete Data Conversion** convert all data including APEX drawings and images

**Addition/Deletions** Allows addition and deletion of values daily

**Deed Processing** allows for the processing of conveyance document # and date recorded into CAMA system

**Apex Drawing Edits** Allows for edits of Apex sketch without complete redraw of sketch

**Download Data by Selects to Excel Spreadsheet** Allows data to be downloaded into an excel spreadsheet; ie. Tax Roll

**Field Appraisal** Allows for images and Apex sketches to be drawn during field inspections with compatible equipment

The following list is for **State Table Appraisal** optional usage provided by the current software provider:

- Residential reappraisal tables allows for creation, modification and deletion of all residential tables and additional residential tables.
- Economic depreciation calculated by subdivision
- Sales comparison of sold properties
- Appraisal factors may be changed by district
- Residential appraisal cards prints appraisal cards
- Residential property cards prints property cards
- Residential property owner's reappraisal updates property appraisal on request
- Manufactured homes reappraisal table allow for creation, modification and deletion of all manufactured homes tables and manufactured homes depreciation tables.
- Manufactured homes appraisal cards allow to print appraisal cards
- Manufactured homes property cards allow to print property cards
- Manufactured homes reappraisal allows by selection, updates manufactured homes appraisal based on tables.



## **REQUEST FOR PROPOSALS (RFP)**

### **Computer System Software and Hardware**

**RFP #2023-01**

Addendum #1

#### **1. Number of Copies**

Offerors shall deliver one (1) original and five (5) identical copies of their proposal to the location specified in the advertisement of this RFP on or before the closing date and time for receipt of proposals. The original copy should be clearly marked "ORIGINAL" on the front cover and shall contain original signatures.