



Additional Vendor Questions (Post Conference Call)

Updated: September 17, 2007

Note: Submitted questions may have been edited or paraphrased for clarity and brevity.

Questions posted September 17, 2007

Question:

Does the County have a list of qualified IT consulting firms located within the County that we might contact to partner on the RFP response? If so, please provide the list.

Answer:

The County is unable to respond to the request as it is up to the proposers to choose who they will partner with, if anyone.

Questions posted September 13, 2007

Question:

... the level of requirements being requested in the RFP are the description of rules, business processes, functions and features, etc. ...

Is the following correct: What is not being asked for is a detailed functional design where specific programs, screens, reports or data tables are being specified possibly with the use of a UML tool or 2) detailed technical design where the functional design is described in technical, pseudo code terms describing the actual programmatic methods, inputs and outputs of the application?

Answer:

The 'build' vs. 'buy' decision will be made after delivery of the system requirements as stated in the RFP, so there is no need for UML or pseudo coding at this stage. However, we **are** looking for description of data types, data flows, and system inputs and outputs. Table-3 in the RFP explains the project tasks, Table 4 specifies the deliverables and Sections 11.10 - 11.13 give examples of the type of output that we are seeking to support us in making the "build" or "buy" decision.

Question:

If a software product is to be procured rather than custom development, we have a streamlined, rapid process that produces a high-quality procurement process for acquiring COTS systems, which is based upon leveraging requirements templates, along with the types of deliverables described in this RFP. It also includes a modified evaluation approach and other tools and templates. May we present this procurement approach as part of our proposal to you? We would provide this as an option.

Answer:

The 'build' vs. 'buy' decision will be made after delivery of the system requirements as stated in the RFP. Selection of a replacement system is out of scope (see Section 11.5). However, vendors are welcome to present any additional information per Section 12.16.



Requirements RFP
Vendor Questions & Answers

Integrated Property Tax
Management System
(Requirements Gathering)

Question:

A similar but different question was answered... [please provide] more clarification. The RFP outlines the requirement of the winning firm to create content that defined key benefits that are anticipated from the planned modernization of the systems. Would the County want the proposer to develop a Return on Investment / Business case for the modernization effort with economic analysis worksheets that consider the capital investment, the operational costs, the tangible and intangible benefits, and the before and after investment comparison of operational costs?

Answer:

We want vendors to generally describe the benefits of migrating from old to new technology, drawing on their experience of similar projects where possible. We are **not** seeking detailed economic analysis.

Question:

As part of this RFP service is there any thought of sending out an RFI to COTS vendors to determine whether there is a reasonably close fit between the requirements developed during this project and the available COTS systems. If this approach were taken, it could determine different procurement steps during the next procurement phase (i.e. develop a buy RFP versus a build RFP, demos, product and service references, etc.). There are different requirements you may want to consider if selecting a COTS vendor rather than a custom development vendor. Would you want us to describe our approach to this process as part of our proposal to give you the option?

Answer:

No, not at this time.

Question:

May we present a modified approach / steps to the RFP so long as we cover all of the requirements and provide an index of the answers to each of the requirements? ...

Answer:

Content and format of vendors' responses must comply with the instructions given in Section 12 of the RFP.

Questions posted September 11, 2007

Question:

Section 6 - Vendor Selection Process -- Is there a percentage evaluation scoring matrix? If so, will SLO share this with the bidders?

Answer:

There is a comprehensive scoring matrix and the scoring and weighting criteria will be finalized before any RFP responses are opened. The general evaluation criteria are documented in Table 2 of the RFP. No further detail will be released to Vendors.



**Requirements RFP
Vendor Questions & Answers**

Integrated Property Tax
Management System
(Requirements Gathering)

Question:

Section 11.2 - Project Organization -- Can you be more specific as to the type and number of resources noted in Section 11.2? What resources will be assigned from IT?

Answer:

The project team will have representatives from every relevant department, including IT. Vendors should state the subject matter expertise needed along with estimates of man-days required in their proposed project plans.

Question:

Are there any known/planned restrictions to named SLO resources during the project, i.e. Roll Preparation, as this will help with project planning?

Answer:

See the indicative high level overview of departmental workload over the calendar year (below).

Property Tax Activity Calendar																
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				
Departmental Peak Workload																
Assessor	H	N	N	N	M	H	M	N	N	M	N	M				
Tax Collector	M	N	N	H	M	M	H	M	M	H	M	H				
Auditor	M	N	M	H	M	H	H	H	H	M	N	H				
IT	M	N	M	N	H	H	H	N	N	N	M	H				
<table border="1"> <tr> <td>Key</td> </tr> <tr> <td>N = Normal</td> </tr> <tr> <td>M = Moderate</td> </tr> <tr> <td>H = High</td> </tr> </table>													Key	N = Normal	M = Moderate	H = High
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As a rough guide, the colors in the chart above indicate increasing levels of peak departmental workload over and above normal activities. The busiest peak times are from June 15th through July 15th and the entire month of December. During peak periods, subject matter expert availability will become more limited. Scheduling subject matter experts will still be possible, but this will require flexibility in the project plan with last minute changes being likely.

Question:

Section 11.6 Project Tasks -- Does SLO have a preference of software tools to be used? Note - RFP mentions Viseo [sic], which is a tool that can be used during the "As-Is" phase.

Answer:

Section 11.9 of the RFP identifies the tools used by the County (including Visio). Vendors are free to use other tools, but must provide an easy and effective means for County project personnel to view, update and interchange information with the chosen project consultants. This is the purpose of the toolset questions in Tables 6, 7 and 8 of the RFP.



Requirements RFP
Vendor Questions & Answers

Integrated Property Tax
Management System
(Requirements Gathering)

Question:

Section 12.13 References -- Can you be more specific as to the type of references?

Answer:

In order of preference; 1) Property Tax projects in the State of California, 2) Property Tax projects in other states, 3) large, complex requirements gathering projects of similar (e.g. perhaps assessor or financial) scope in the public sector (preferably California).

Question:

Does SLO have an overall technology platform direction, i.e. .NET, J2EE, etc?

Answer:

The County IT environment is outlined in Section 1.2 of the RFP which is sufficient for the purposes of this RFP. As stated in a previous answer, the RFP scope is for requirements definition and the deliverables should be technology neutral.

Question:

Will SLO accept new language and/or T's & C's beyond just exceptions, i.e. adding language around limitation of liability, consequential damages?

Answer:

As part of stating exceptions (Section 12.15), vendors may propose other changes. These will be considered and evaluated as part of the overall scoring process (see Table 2, Item 15).

Question:

Does SLO have a payment schedule, or looking to the bidders to provide recommendations?

Answer:

The RFP breaks down project tasks, deliverables (Tables 3 and 4) and the Cost Proposal (Table 11) with a view towards a deliverable milestone-based payment schedule. However, the County will consider other schedules and vendors may provide alternative suggestions. These will be finalized during contract negotiations with the chosen vendor.

Question:

Will SLO consider extending the due date of the RFP due to the level of detail in the RFP and the required proposal response [format]?

Answer:

This is a complex, high profile project and the County wants to provide Vendors the chance to submit comprehensive and high-quality responses to the RFP. After deliberation, the project team has recommended that the RFP response date be extended to October 23, 2007 and this has been ratified by the Steering Committee. An addendum to the RFP will be published on the County purchasing website in due course.



Requirements RFP
Vendor Questions & Answers

Integrated Property Tax
Management System
(Requirements Gathering)

Question:

For development of project schedule, should we assume a March 1, 2008 start date?

Answer:

Given the revised timeline, April 15, 2008 is a realistic start date.

Question:

Are the Clerk of the Board and the associated Assessment Appeals Board responsibilities out of scope of the requirements definition?

Answer:

The Assessment Appeals process is in scope (see RFP Section 10.1.13). For SLO County, the County Clerk-Recorder serves as both Clerk of the Board of Supervisors and as Clerk of the AAB. The Clerk-Recorder's office is organizationally separate from the Assessor's Office. The interaction with the AAB / Clerk-Recorder should be identified and treated as an external interface.

Question:

Do you expect the vendor to perform a build vs. buy assessment, or just provide the necessary artifacts to support this evaluation?

Answer:

As currently scoped, the vendor will not participate in the 'build' vs. 'buy' assessment. But, as stated in the RFP, the deliverables must be of a level of detail and quality sufficient for the County to make that decision (Section 11, pp 49, et. al.).

Question:

Section 12, page 58, third bullet states "... Vendors must use the files enclosed with the RFP and the prescribed format...". What files does this statement pertain to?

Answer:

This is an editing error – there are no embedded files in this RFP. However, please ensure that the numbering for all responses is consistent with the RFP numbering scheme as stated in Section 12.

Questions posted September 7, 2007

Question:

Can SLO make available a list of prospective bidders and their contact information?

Answer:

Since anyone can pick the RFP up anonymously from our website, we will not know the full list of prospective bidders until the RFP responses are submitted. However, we will be able to provide you with company names at the end of the selection process and once negotiations are completed with the selected vendor.



Requirements RFP
Vendor Questions & Answers

Integrated Property Tax
Management System
(Requirements Gathering)

Question:

Are bidders able to partner up and submit a joint proposal?

Answer:

Yes. The requirements for these are outlined in Section 12.12 of the RFP and there must be a single point of contact, ownership and control both for the contract and for the subsequent project management team if you are chosen. Also see Table 5 item 13.

Question:

Will the successful bidder for the consulting engagement be allowed to bid on any subsequent RFP for a COTS software solution to replace the existing legacy property tax system? Or stated another way...is there anything in County rules and regulation or statute that would prevent the vendor who conducts the consulting work from bidding on the expected follow-on software implementation project?

Answer:

Per our answer to a similar question raised during the vendor pre-proposal conference call on September 5th – "no, there are no such restrictions".

Question:

On page 61 of the RFP, Item #13 of Table 5, "Company Background Questionnaire," the question is asked; "Does your company develop or sell, or have an alliance with any company that develops or sells, Property Tax systems? If so, what systems and/or partners?" Is this question being used to identify those vendors that might have a software solution so they can be eliminated from consideration for the consulting engagement? This relates to question #1.

Answer:

Per the RFP vendors are allowed to form alliances – the requirements for these are outlined in Section 12.12 of the RFP. The purpose of Question 13 in Table 5 is to ensure that such alliances are declared.

Our intent is that if an alliance is proposed, there must be a single point of contact, ownership and control both for the contract and for the subsequent project management team if that solution is chosen.

Question:

Since much of our proposal will be in response to questions posed in the RFP, can you supply a Word version of the RFP?

Answer:

Yes. A copy is available in Word format on the project Q&A [this] web page.