Lake County, Ohio

Request for Proposals for the following:

Property Tax Accounting Software,
Computer Assisted Mass Appraisal (CAMA)
Software
And Implementation Services

Issued by the:

Lake County Commissioners

In conjunction with the Lake County Auditor, the Lake County Treasurer, the Lake County Information Technology Department and various other County Departments

1840 Lake

Lake County, Ohio

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Lake County, Ohio

EDWARD H. ZUPANCIC
COUNTY AUDITOR

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September 25, 2014

Correction to the Request for Proposals Issued by
the Lake County Board of Commissioners
for Property Tax Accounting Software,
Computer Assisted Mass Appraisal (CAMA) Software,
and Implementation Services

Attachment 9

Due to the fact that Ohio Revised Code Section 2909.33 has been repealed, Attachment 9 (Declaration Regarding Material Assistance/No Assistance To a Terrorist Organization) is no longer required to be submitted as part of a proposal in response to the RFP. Any reference to this document elsewhere in the RFP shall be considered stricken.

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RESPONSE CHECKLIST

LAKE COUNTY PROPERTY TAX ACCOUNTING & CAMA SOFTWARE AND IMPLEMENTATION SERVICES

This checklist is provided as a guide to assist in assembling a response to this request for proposals. Refer to ***Section 1 – Detailed Instructions*** and ***Section 4 – Proposal Format and Submittal*** for additional information.

Mandatory Dates

_____ Attend the mandatory vendors' conference on ***September 24, 2014 at 11:00 A.M.***
_____ Submit the response by 11:00 A.M. local time on ***Wednesday October 8, 2014.***

Response Packets Must Include

_____ 5% bond
_____ 3 copies of the proposal which include the following:

- _____ Form of proposal statement as the first page *(Attachment)*
- _____ Executive summary *(See Section 4.3 for explanation)*
- _____ Vendor profile *(See Section 4.4 for explanation)*
- _____ References *(See Section 4.5 for explanation)*
- _____ Proposed system overview *(See Section 4.6 for explanation)*
- _____ Completed copy of the software minimum requirements section *(Section 7)*
- _____ Completed copy of the proposal response cost summary *(Section 8)*
- _____ Recommendations for system backup procedures
- _____ Recommendations for support and maintenance
- _____ Recommendations for system implementation, including training
- _____ Exceptions to the request for proposal
- _____ Required forms – (listed on page 54 – see Attachments)

SECTION 1 - INSTRUCTIONS TO BIDDERS

1.0 Request for Proposals Title

Request for Proposals for Property Tax Accounting and Computer Assisted Mass Appraisal (CAMA) Software and Implementation Services for Lake County, Ohio.

1.1 Purpose

The Board of County Commissioners ("Board") of Lake County, Ohio, located at 105 Main Street, Painesville, Ohio 44077, on behalf of the Lake County Auditor ("Auditor"), the Lake County Treasurer ("Treasurer"), the Lake County Information Technology Department ("IT Dept."), and other County departmental users, is issuing this Request for Proposals ("RFP") to select a reliable vendor to install a property tax accounting and computer assisted mass appraisal (CAMA) software system. This new system includes system software, application software, utilities, training, implementation services, maintenance, and documentation. The intent of procuring a new property tax accounting and CAMA system is to enhance information access and increase staff efficiency in the services they provide. The successful vendor must provide a well-documented, turnkey solution meeting the specifications provided in this document.

1.2 Introduction

VENDORS SHALL THOROUGHLY REVIEW THIS DOCUMENT IN ORDER TO PROVIDE SUFFICIENT INFORMATION IN THE RESPONSE FOR TOTAL EVALUATION. THIS RFP PROVIDES AN ESTIMATE OF REQUIREMENTS. **NO GUARANTEE IS MADE OF ANY SPECIFIC AMOUNTS TO BE PURCHASED.**

ANY CONTRACT PURSUANT TO THESE PROPOSAL SPECIFICATIONS SHALL BE AWARDED TO THE OFFEROR WHOSE PROPOSAL IS MOST ADVANTAGEOUS TO THE COUNTY. THE BOARD OF LAKE COUNTY COMMISSIONERS RESERVES THE RIGHT TO REJECT ANY AND ALL PROPOSALS AND WAIVE TECHNICALITIES IN ANY PROPOSALS.

1.3 Eligible Vendor Criteria

Vendors wishing to be considered for award must:

1. Attend the Pre-Proposal Vendors' Conference on, *Wednesday September 24, 2014 at 11 A.M.;*
2. Submit a response proposing a solution that meets the RFP specifications by *11:00 A.M. Wednesday, October 8, 2014*;
3. Submit a bond in the amount of five percent (5%) of the total offer with the response by *Wednesday, October 8, 2014 at 11 A.M.;*
4. Complete and submit all forms required in the attachments at the end of this document;
5. Sign the contract within 30 days of award; and

6. Provide a 100% performance bond upon execution of the contract. Bond will be returned to the successful offer or upon execution of the performance bond.

1.4 RFP Timetable

The timetable listed below contains firm and anticipated deadlines. The anticipated deadlines are to be viewed only as projected time frames.

Firm Dates, No Extensions

RFP Issued	Friday, September 12, 2014
Vendors' Pre-Proposal Conference	Wednesday, September 24, 2014 at 11:00 A.M.
Last Day for RFP Questions	Wednesday, October 1, 2014 at 4:30 P.M.
Proposals Due and Opening	Wednesday, October 8, 2014 at 11:00 A.M.

Anticipated Dates (subject to change)

Software Presentations by Selected Vendors	Beginning Monday, October 20, 2014
Potential Site Visits	At discretion of Lake County
Vendor Selection	Thursday, November 20, 2014
Execution of Contract / Purchase Order	Week of November 24, 2014
* Installation / Implementation/Training	To be determined
* Project Completion	To be determined

* The County and the vendor will jointly agree upon the dates that best meet the needs and schedules of the County with respect to property tax deadlines and settlements. However, software must be installed, operational, and training provided no later than Tuesday, March 1, 2016.

1.5 Vendors' Conference Procedure

The County will hold a Pre-Proposal Vendors' Conference for the RFP on ***Wednesday, September 24, 2014 at 11:00 A.M.*** The Vendors' Conference will be held in the Lake County Administration Building, Auditor's Conference Room, 105 Main Street, Painesville, Ohio 44077. **In order to be eligible to submit a proposal to this RFP, an authorized representative from each Vendor desiring to respond to this RFP shall attend and register at the Vendors' Conference.**

It is the County's intent to answer all questions asked by the Vendors at this Conference. Inquiries will be taken from the floor. However, the County may elect to respond to any or all questions in writing through an RFP addendum. Any resulting modification(s) to the RFP requirements will be issued to the attendees only in the form of an RFP addendum by Monday, October 6, 2014.

1.6 Publicity

Any use of or reference to this RFP or the County by the Vendor to promote, solicit, or disseminate information regarding the scope of the Contract is prohibited, unless otherwise agreed to in writing by the County. Furthermore, the successful Vendor who is awarded the Contract for this installation will advise the County of any intention to use the County as a reference or in advertising before initiating any such action and again the Vendor will secure agreement in writing from the County. Failure to perform these arrangements will be considered a violation of this Contract for which the County may seek redress through a civil action.

1.7 Communication Restriction

Vendors shall not communicate with any member of the County's staff concerning this RFP from its release date until a Vendor has been selected and a Contract executed, except by the method described in Section 1.8. If a Vendor attempts any unauthorized communication, the County may disqualify the Vendor from further participation in the RFP process or reject that Vendor's proposal.

1.8 RFP Inquiries

Questions may be asked regarding the RFP and the County will use its best efforts to respond at the Vendors' Conference. All inquiries must be written and include the company name, address, and contact name followed by the question. These questions can either be mailed to Michael Matas, Chief Deputy Auditor, Lake County Auditor's Office, Lake County Administration Building, 105 Main Street, Painesville, Ohio 44077, e-mailed to Michael.Matas@lakecountyohio.gov, or faxed to the attention of Mr. Matas at (440) 350-2667. All questions and answers will be reviewed at the Vendors' Conference. Questions will be accepted until one week after the Vendors' Conference, or by 4:30 P.M. on October 1, 2014. All vendor questions received after the Vendors' Conference, and the related County responses to those questions, will be distributed to all vendors via e-mail. No further questions concerning how to respond to the RFP will be accepted or answered after 4:30 P.M. on October 1, 2014.

1.9 Performance Bond

The successful vendor will be required to furnish a performance bond for the faithful performance of the contract in a sum of not less than one hundred percent (100%) of the contract price. Said bond shall be that of an approved surety company authorized to transact business in the State of Ohio, to the satisfaction of the Prosecutor of Lake County, Ohio. Agents of bonding companies which write bonds for the performance of the contract shall furnish power of attorney, bearing the seal of the company, evidencing such agent's authority to execute the particular type of bond to be furnished, and evidencing also the right of the surety company to do business in the State of Ohio. A copy of this proof shall be attached to each copy of the contract. This copy shall be no more than one (1) year old. This bond shall be purchased through a surety company having local agents upon whom service of process may be made.

If, at any time after the execution and approval of this contract, Lake County deems any of the sureties upon the performance bond to be unsatisfactory, or if for any reason such bond shall cease to be adequate security for Lake County, the vendor shall within fifteen days after written notice of Lake County to do so, furnish a new or additional bond in form, sum, and signed by such sureties as shall be satisfactory to Lake County. No further payment shall be made to the vendor unless and until such new or additional bonds are provided by the vendor. The proposal guarantee shall be returned after a satisfactory bond has been furnished and the contract has been executed.

1.10 Damages for Failure to Enter into Contract and Provide Performance Bond

The successful vendor, upon failure or refusal to execute and deliver the contract and performance bond required within thirty (30) days after receipt of notice of the acceptance of the proposal, shall forfeit to Lake County, as liquidated damages for such failure or refusal, the security deposited with its proposal. Lake County shall have the right to expenditures for good cause shown.

SECTION 2 - STATEMENT OF WORK

2.0 General

It is the intent of the County to describe a complete and working system that is available at the time of the proposal. If the description of the working system in the RFP specifications herein does not provide a complete working system which will work in a commercially reasonable manner, then any items omitted from the specifications herein must be provided as part of the Vendor's total not-to-exceed cost in order to deliver a working system and be in compliance with the specifications. In addition, the specifications provided in this document are the minimum requirements. If the Vendor has products or recommendations that improve the system or exceed the requirements, it is to the benefit of the Vendor to include them in the proposal.

The Vendor selected must specify, as a single point of contact, all hardware, software, and services needed to make a complete working system as described herein, which includes but is not limited to equipment, networking services, cabling, hardware, software, installation services, training services, maintenance services and application support services, as required to meet the scope of the RFP. The County plans on supplying and installing all hardware, unless specifically arranged otherwise. The County has standardized on Dell brand computers and Hewlett Packard brand network equipment. Lake County has adopted Microsoft's Active Directory for its network authentication, and has standardized on the latest versions of Windows Server and SQL. Almost all desktop computers are Dell brand Optiplex PCs equipped with a Pentium 4 CPU or higher, at least 1 GB RAM, and 80 GB hard disk. Almost all desktops run Windows 8 and Microsoft Office 2013.

The County's infrastructure includes 100 mbps or 1 GB to the desktop, with a gigabit backbone. The County utilizes Dell Servers and Dell Equallogic SAN Storage configured with VMware ESXi enterprise hypervisor and infrastructure management. The County uses Microsoft Exchange 2010 for its email service.

After award of the Contract, the selected vendor must schedule a meeting with the County to confirm the implementation plan. All products proposed in response to this RFP must be available at the time of RFP submission.

The anticipated system delivery and installation schedule is disclosed in Section 1.4 of this RFP. The County may delay any delivery to a mutually agreeable time. All shipments of hardware and software by the Vendor shall be F.O.B. destination and delivered to the Lake County Information Technology Department, 105 Main Street, Painesville, Ohio 44077, ATTN: Ken Pintar.

2.1 Background Information

Lake County, located in Northeast Ohio along Lake Erie, encompasses 23 municipalities, villages and townships. The County was first organized in 1840 and includes 231 square miles and approximately 230,000 residents, based on the results of the 2010 Census. The County Seat

is located in the City of Painesville, which is located about 30 miles northeast of downtown Cleveland.

Lake County employs roughly 2,100 full-time equivalent people, with many of them located in County facilities in Painesville. Some departments are located throughout the County with multiple locations. Many County Departments will be impacted with the acquisition of this new software. However, the offices of the Auditor, Treasurer, Prosecutor, and Engineer will be the primary users of this software.

The County's current property tax accounting software is called "MVP" which was developed by Manatron and installed in 2009 on the County's VMware Server Infrastructure. The MVP Server operating system is Microsoft Windows Server 2008 x64 and utilizes a Microsoft SQL 2008 x64 Database.

The County's current CAMA software is called Integrated Assessment System (IAS), version 4.0, from Cole-Layer Trumble Company. The system was installed in the mid-90's and updated to run on Windows 7 or newer operating systems in 2014. This system is also on the County's VMware Server Infrastructure. The IAS Server operating system is Microsoft Windows 2008 R2 x64 and utilizes an Oracle11gR2 SQL Database. All users access the system via their desktop P.C.'s. Users can perform print screens at their desktop. System reports utilize a high-speed laser printer. A utility application called Query Builder is used as an ad-hoc report writer but it has some limitations.

The current software meets the current needs of the County. However, we are interested in replacing the system for the following reasons:

1. Eliminate the need for dual entry. Currently the county manually enters the values generated in the CAMA system into the tax accounting software.
2. Modernize and streamline the assessment and tax accounting functions of the office.
3. While the County is pleased with its current CAMA software product, the County wishes to explore the option of a totally integrated tax accounting and appraisal system with the added functionality of integrating G.I.S. and aerial/oblique imagery.
4. Reduce costs and improve efficiency between departments by deploying a system that improves workflow by automating paper-based manual processes.
5. Improve reporting capabilities.
6. Explore the possibility of using electronic data in the field for appraisal purposes.
7. Take advantage of a graphical user interface for easier use.
8. Use a product that can exchange data with other programs more easily.
9. Better data storage/records for manufactured homes
10. Ability to scan and store documents related to parcel records
11. Have the ability to use a web-based application to reduce or eliminate the need for expensive hardware and internal maintenance. Further data back-up protection.

Lake County's property tax responsibility rests with two separate and distinct departments with separately elected officials, the County Auditor and the County Treasurer. The Auditor sets the real estate valuations and distributes all taxes collected to the respective political subdivisions. The Treasurer mails tax bills and collects all property tax payments. All cash receipts are recorded by both offices but the actual cash/checks are deposited with the Treasurer.

2.2 *General Property Tax Statistics for Lake County*

The following statistical information is provided by the County to assist offerors in understanding the property tax operations of the County. Consideration of this information should allow the offeror to evaluate the County's requirements and propose a system which will best serve the needs of the County:

TY2013/CY2014 Assessed Valuations:	
Residential	$4,158,669,800
Agricultural	92,327,990
Commercial	846,776,090
Industrial	307,885,540
Public Utility Personal Property	302,330,540
Mineral Rights	917,060
Exempt	463,719,700
TOTAL	$6,172,626,720
TY2013/CY2014 Parcel Count:	
Residential	95,702
Agricultural	1,697
Commercial	5,779
Industrial	2,093
Public Utility	169
Gas/Oil	448
Exempt	3,266
TOTAL	109,154
Number of Manufactured Homes:	2,164
Numbers of Homestead Exemptions:	
Real Property	21,623
Manufactured Homes	519

SECTION 3 - GENERAL SYSTEM REQUIREMENTS

3.0 Scope of this Project

The County wants to use this project as an opportunity to take advantage of newer technologies in the marketplace to obtain an integrated CAMA and Tax Accounting System.

The County expects to achieve substantial gains in productivity, efficiency, and accuracy, and decrease its operating costs through the implementation of the new software. In addition, the County seeks to minimize internal support costs by utilizing up-to-date technology, such as newer versions of Windows and SQL Server databases, which are now in place. The County believes it has a responsibility to its citizens to stay current with technology and continuously extend and enhance services to its residents and businesses via the Internet. The County seeks to position itself as a leading-edge county using innovative technology to deliver better service to its citizens.

The County seeks proposals from software and implementation service providers that specialize in developing and installing property tax accounting and appraisal systems for government.

By selecting and installing a new tax accounting software system and potentially a new appraisal software system, the County seeks to:

- Simplify processes
- Apply "best practice" processes
- Streamline procedures
- Improve reporting and facilitate report distribution
- Enhance strategic planning of future sexennial reappraisals
- Achieve or exceed compliance with all state regulations and standards
- Improve productivity by eliminating duplicate entry
- Continue to enhance Internet-based services
- Boost employee productivity and accuracy by providing an intuitive, easy-to-use software solution

3.1 System Requirements

As stated earlier, the County is seeking proposals for a property tax accounting system, a CAMA system, and comprehensive implementation services. The proposals shall include a recommendation for the system(s) that best meets the County's functional requirements, including a project time line, and hardware and software requirements. In addition, the proposal shall include estimates of the amount of participation time required of County personnel for implementation and operational maintenance. Other components of the proposal shall include training requirements and any recurring and non-recurring costs required for implementation and maintenance of the recommended system. The software and services package proposed by the successful bidder shall provide the County, at a minimum, with a single-source solution to replace the existing property tax accounting and CAMA software system with a totally integrated property tax accounting and CAMA application.

The solution should be fully integrated, user-friendly, and have a web-based user front-end application. It should also utilize current programming languages and utilize the latest version of Microsoft SQL Server for its database. The software solution should have some customizable reporting features but for the most part be standardized software that fits the State of Ohio's requirements for CAMA and Tax accounting. Therefore, a table-based software solution is highly desired with little to no customization of vendor code.

It is important to note that the County extensively uses virtual server technology (VMWare). All software must be able to run in virtual server(s), and the vendor must attest that the proposed software solution will operate in this environment. The IT Department will maintain the virtual servers and VMWare licensing.

3.2 Data Conversion

As previously stated, the County is currently operating on a property tax accounting software system originally purchased from Manatron (Thomson Reuters) and a CAMA software system from Tyler Technologies. Vendors must address the feasibility and cost of converting existing data files from the County's current computer system to the proposed system. Feasibility should include consideration of past experience in converting data from similar equipment/software, potential problem areas and timing. Cost for conversion should be based on an hourly rate with a maximum not-to-exceed bid for conversion of all necessary data.

Considering that, potentially, implementation and data conversion of the new system may occur in the middle of a tax year, there may be data fields that are populated with transactions that have been posted to the Manatron software up to the "go-live" date that will need to be converted for the new software. This cost must be identified under "Current Year Data Conversion Costs" in Section 8 (pages 51-53). The County has many years of data history such as ownership, sales, and valuations which will need to be converted. The costs attributed to the conversion of prior year's data must be shown in the Prior Years Data Conversion Costs in Section 8 (pages 51-53). All responses to this RFP must include a detailed plan to convert the respective data. The County can provide flat files or Excel files with the data from the existing systems, accompanied by record layouts to aid in interpretation. The County will also provide limited technical assistance. Coordination of this data transfer will be the responsibility of the vendor.

The County recognizes that applications vary in what and how data is collected. The County also recognizes that data elements of a descriptive, narrative variety may not translate well to data elements that are specifically defined, codified, or table-driven. The County also recognizes that data elements that have been inappropriately or erroneously used may not translate well. Given these conditions however, the County nevertheless expects that this data transfer be complete, thorough, and with minimum interruption. Before executing the data conversion, the Vendor will provide a detailed report to the County in writing as to which data fields will transfer to the new system, and which data fields will not, if any. The cost of this conversion must be identified in the appropriate section of the bid response cost summary sheet, section 8. Any manual re-keying of the data is to be included as part of the conversation cost.

3.3 Security

The County is concerned about the security of the system and data. The County, with potential limited assistance from the Vendor, will be responsible for establishing network security to prevent all unauthorized outside access. However, the Vendor is responsible for providing database and application security through the software to verify authorized access to the appropriate areas and prevent unauthorized access. The Vendor will instruct appropriate County personnel as to how the security system operates within the software and the County will manage the security definitions on an employee-by-employee basis. The Vendor will supply all necessary log-in credentials.

3.4 Users Group

The County is committed to developing and maintaining a quality comprehensive system. In addition, the County is interested in collaborating with other counties that are using the selected system. Therefore, the selected Vendor should have an active users' group and demonstrate that they, the Vendor, have been responsive to the users' requests for new features.

3.5 Cabling

The Lake County Telecommunications Department performs all cabling for the County.

3.6 On-Site Application Support and Software Changes

Vendor shall provide on-site application support, when required, and telephone assistance for the software as part of the maintenance proposal which is to be priced in section 8. To facilitate system servicing, the County can provide remote access via the Internet between the Vendor and the County for problem identification and resolution.

As long as a maintenance agreement, which includes all application and system software, exists between the Vendor and the County, the Vendor agrees to the following:

The Vendor will formally make a request to the County twenty-four (24) hours

in advance either by phone or in writing to the system administrator for authorization for any program enhancements, problem resolutions, or changes to any applications, or system software; and

The Vendor agrees not to eliminate, reduce, or depreciate any functions performed by the installed software unless agreed to by the County's designated contacts.

In the event of any change to any software residing on this system without authorization by the system administrator, which leads to a software or hardware failure or reduction in the performance of any software or hardware, the Vendor agrees to reimburse the County for any actual and direct damages or actual and direct losses incurred by the County.

Vendor will provide complete software support even though hardware is purchased elsewhere. It is not acceptable to discontinue/reduce software support because the hardware was purchased from a third party.

No delay or omission to exercise any right or option accruing to the County upon any failure caused by the Vendor shall impair any such right or option or shall be construed to be a waiver thereof, but any such right or option may be exercised from time to time and as often as may be deemed expedient by the County.

3.7 Training

In order to become an efficient and effective user of this system, training is required. It is desirable for the County to plan on all training to occur on-site and to accommodate the hours of operation of the County (8:00 A.M. to 4:30 P.M.). Employee time and travel expenses can be conserved if the training occurs at the County. Therefore all proposals should consider the County as the primary site for all training and consideration should be given by the Vendor that training may be required for multiple groups. Both facilities and personnel will be available at a mutually agreeable time scheduled in advance. Training shall be provided for all software products, including any supporting software such as report writers. Security training must be provided to system administrators as designated by the County. Prior to the start of training, the Vendor must perform a preliminary review of all County operations and all software options with County staff in order to ensure maximum utilization of the system. The training recommendation must be explained in detail. It is the County's intent to have the Vendor train the Auditor's and Treasurer's staff (approximately 30 people) on the new system and those employees will train the remaining departmental users. The County is very receptive to training via Webex or other internet based solutions, in order to minimize training/travel costs.

3.8 Software and Documentation Licensing

The Vendor shall provide a copy to the County, privileged from distribution to other persons, of all source code, object code, database layouts, structured software codes, and other materials, so that the County can replicate in all respects the program of the Vendor in the event of the Vendor's discontinuance from business, insolvency, catastrophic destruction, or in the event of the termination of this Contract in order for the system information to be properly downloaded onto the system of some other provider. If the Vendor will not provide source code to the County, source code escrow will be acceptable. Detailed information must be provided in the System Overview Section of the Vendor's bid explaining the source code site, storage and update policies and what elements are stored.

Any and all license fees for software must be included in the Vendor's proposal.

3.9 Installation Considerations

All work performed by the Vendor will comply with all local, state, and federal health and safety laws and regulations. If applicable, the Vendor is required to verify that their product is properly functioning on any newly installed lines.

Vendors may propose any configuration they feel is equivalent and meets at least the minimum RFP requirements. The Vendor must provide any custom coding required by the system to meet the RFP specifications at no additional cost to the County. The Vendor must provide the source code or source code escrow.

3.10 Future Considerations

In the future, the County must be provided the latest version available in software products quoted by the Vendor and such revisions must be provided and installed in the County not later than thirty (30) days after the first commercial availability of such revision. Additionally, the County must be the registered user of any other products that are provided as adjuncts to this system.

By entering into a contractual agreement with the County, the successful Vendor acknowledges that future statutory, administrative rule, and/or Ohio Auditor of State changes may result in required modifications to the software. These modifications must be installed on the system not later than 30 days before the effective date of the change as published by the issuing agency. While the County may notify the Vendor of any modifications required by the aforementioned agencies, it is the Vendor's responsibility to be informed and remain informed of all present and future modifications, and any changes issued by an agency that require changes in the record keeping or other property tax assessment and accounting functions performed by the County. Failure by the successful Vendor to comply with this requirement may constitute a breach of the contract and could be subject to legal remediation.

3.11 *Virus Security*

The Lake County IT Department will provide the antivirus protection on all new servers and computers. If the Vendor is going to remotely access the system, the Vendor must use virus protection that is regularly updated with the latest virus definition files. The IT Dept. reserves the right to review the anti-virus solution on any remote computer accessing the County network.

3.12 *Innovations, Accessories and Enhancements*

The County recognizes that many vendors have distinguished themselves and their products through innovations, accessories, and enhancements. The County considers this an important element in the selection of a vendor and solution, since these improvements reflect on the vendor's commitment to their product and to this market. Therefore, the Vendor should consider including such innovations in their Vendor Profile.

SECTION 4 - PROPOSAL FORMAT AND SUBMITTAL

4.0 Introduction

These instructions describe the required format for a Vendor's proposal. The Vendor may include any additional information considered pertinent. An identifiable tab sheet shall precede each part for easy reference. The proposal submitted shall follow the same format as described below. All pages, except preprinted technical inserts, shall be sequentially numbered.

VENDORS: PLEASE NOTE: The County is requesting proposals for two (2) options: (1) for an integrated tax accounting and CAMA system that is hosted by the County; (2) for an integrated tax accounting and CAMA system that is web-hosted by the vendor. Any vendor can submit proposals for any or all of the two options presented. The County reserves the right to select or reject proposals. As a result, item #2 (Form of Cover Page of Offeror's Proposal) and item #9 (Cost Summary Form) noted below have been structured for the vendors to submit proposals on the two options.

All materials submitted in response to this RFP shall become the property of the County and may be returned only at the County's option. All submitted proposals shall be open to public inspection following official notification of the award of the resulting Contract.

Any proposal submitted must include the following:

1. A *bond* in the amount of five percent (5%) of the total proposal;
2. The vendor's "*Form of Cover Page of Offeror's Proposal* (Attachment 1) as the first page of the proposal;
3. An *Executive Summary* in the form of a cover letter;
4. A *Vendor Profile;*
5. *Profiles* of the personnel expected to be assigned to this project, if Vendor is selected;
6. *References;*
7. A *system overview;*
8. A completed *software technical requirements* section (Section 7);
9. A fully completed *cost summary form* (Section 8);
10. A section detailing the *minimum hardware requirements* for the system;
11. A section detailing *system backup recommendations*;
12. A section detailing *recommendations for support and on-going maintenance*;
13. A projected *implementation schedule*, including training recommendations;
14. A section detailing any *exceptions to the RFP*;
15. *Proof of insurance;*
16. Complete all required attachment forms.

Three (3) copies of each proposal must be submitted. Vendors may propose more than one solution in response to the RFP, but each solution must be submitted as a separate proposal.

Proposals are due no later than ***Wednesday, October 8, 2014 at 11:00 A.M.*** Proposals or unsolicited amendments to proposals received after ***Wednesday, October 8, 2014 at 11:00 A.M.*** will not be considered. Vendors mailing proposals should allow for normal mail time to ensure

the timely receipt of their materials. Proposals must be mailed or delivered. Electronically transmitted proposals of any kind (i.e. fax, e-mail, etc.) will not be accepted.

An offeror is permitted to withdraw the offeror's proposal at any time prior to the award of a contract.

Send all proposal packages to:

Board of Lake County Commissioners
Attn: Amy Elszasz, Clerk to the Commissioners
Lake County Administration Center
105 Main Street
Painesville, Ohio 44077

Please clearly mark the submission "Proposal for County Property Tax Accounting Software and Computer Assisted Mass Appraisal Software and Implementations Services" on the outside of the package.

4.1 Bond

Submit a bid bond in the amount of five percent (5%) of the total of bid options #1 and/or #2.

4.2 Form of Proposal Statement

The first page of the vendor's proposal shall be a properly completed Form of Cover Page of Offeror's Proposal *(Attachment 1)*.

4.3 Executive Summary

A brief description of the scope of services to be provided by the Vendor must be stated. A positive commitment assuring that the overall system implementation will be successful must be made. In addition, the Vendor must identify their philosophy of improving and maintaining this software product as well as how they will deliver enhanced versions of this software to the customer. This cover letter should be signed by a representative authorized to legally bind the company, and must include the Vendor's main contact for contractual issues, the purchase order address and the tax identification number.

4.4 Vendor Profile

A description of the range of products and services relating to this project that are provided by the Vendor must be included. The length of time the proposed software has been available on the market, and the number of systems installed by the Vendor and their approximate size must be stated.

This section shall also include a description of the Contractor's experience relevant to this RFP and a current financial statement prepared by the Vendor's independent auditor. In addition, if the Vendor is certified by a manufacturer for reselling, training or any other function, proof of

certification must be provided to substantiate certification.

4.5 References

ALL current clients of the proposed application that have been installed are to be included in the proposal. References provided may be contacted by the County concerning the Vendor's products and services.

4.6 System Overview

The Vendor must provide a narrative and/or diagram overview of the operations of the fileserver and its components, software and topology, required peripherals, application software and system software as contained in the Vendor's response. In addition, the Vendor should state how this proposed system responds to the performance requirements identified in this RFP.

4.7 Software Technical Requirements

A copy of Section 7 entitled **Software Minimum Requirements** must be fully completed as specified and submitted as part of the Vendor's response.

4.8 Cost Summary Form

The Vendor must complete and submit Section 8 in its entirety. The total cost must be equal to the total cost of the Proposal Statement in 4.2 above.

4.9 System Backup

The County will be responsible for all system backups. For vendor web-hosted solutions the vendor will be responsible for back-ups.

4.10 Recommendations for Support and On-going Maintenance

Annual software support costs must be itemized separately, on an annual basis for a period of at least the first four years after implementation, on the appropriate proposal form. **If the vendor provides discounted pricing for multiple year support contracts, as opposed to annual, both options should be provided.** The County reserves the right to choose between annual or multi-year support agreements, if offered.

Considering both the Vendor and user perspectives, describe the various levels of support you feel are necessary to implement and maintain this system. Indicate which services have been included in your total cost and which additional services could be purchased, if required later, on a time and material basis. Include the hourly rate and estimated number of hours of any

services you propose for later consideration.

4.11 Implementation Schedule with Training Overview

The County estimates issuing a purchase order in late November 2014. The County is flexible with regard to an estimated implementation with the only requirement being that the system must be installed, operational, and all appropriate County employees trained by March 1, 2016. The vendor will work with the County in determining the optimal implementation date while considering, among other items, property tax cycles, tax abstracts, tax billing dates, tax settlement, etc. Once a time frame has been determined, the County requires the Vendor to respond with an anticipated implementation schedule that reflects their availability after this date and provide an overview of how training will occur.

4.12 Exceptions

Any exceptions to the Request for Proposal must be clearly stated and must reference those sections concerned.

4.13 Proof of Insurance

The Vendor shall provide proof of Workers' Compensation Insurance coverage. The Vendor also shall provide proof of Employees' Liability or Vendor's Insurance, or both.

4.14 Delinquent Personal Property Tax Affidavit

The Vendor shall complete and submit an affidavit concerning delinquent personal property taxes *(Attachment 2)*.

4.15 Buy Ohio Disclosure Statement

The Vendor shall complete and submit a Buy Ohio disclosure statement *(Attachment 3)*.

4.16 Non-Collusion Affidavit

The Vendor shall complete and submit an affidavit concerning non-collusion *(Attachment 4)*.

4.17 Campaign Contributions Affidavit

The Vendor shall complete and submit an affidavit concerning campaign contributions *(Attachment 5)*.

4.18 *Declaration Regarding Material Assistance/No Assistance to a Terrorist Organization Affidavit*

The Vendor shall complete and submit an affidavit concerning any affiliation with terrorist organizations *(Attachment 9)*

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4.19 *Unresolved Findings for Recovery*

The County shall not award a contract to a Vendor against whom a finding for recovery has been issued by the Auditor of State if the finding is unresolved.

SECTION 5 - EVALUATION AND SELECTION

5.0 Evaluation of Proposals

A committee of County personnel will evaluate the proposals. The County reserves the right to reject any and all proposals in which the offeror takes exception to the terms and conditions of this RFP; fails to meet the terms and conditions of this RFP, including but not limited to, the standards, specification, and requirements specified in this RFP; or submits prices that the County considers to be excessive, compared to existing market conditions, or determines exceed the available funds of the County. The County also reserves the right to reject, in whole or in part, any proposal that the County has determined, using the factors and criteria listed in the section, would not be in the best interest of the County. The evaluation committee may waive minor defects that are not material when no prejudice will result to the rights of any other Vendor or the public. In addition, the County reserves the right to waive any technical requirements.

5.1 The Evaluation Process

The Board of Lake County Commissioners will consider, among other items, the following factors in making its evaluation, each of which has been attributed with a percentage to reflect the importance of each factor:

1. Total amount of the proposal – 5%
2. Technology proposed in the proposal – 5%
3. Service response time and agreements – 15%
4. Compliance/Completeness of the Software Minimum Requirements – 35%
5. Installation schedule of all software – 15%
6. Level/Quantity of training proposed – 15%
7. Suggestions and services offered that go beyond the scope of the RFP – 10%

A score, ranging from 1 to 3, will be assigned to each factor based on what is contained in each proposal. A score of 3 means that the criteria exceeded expectations; a score of 2 means that it meets expectations; and a score of 1 means that it does not meet expectations. All of the scores will then be calculated. In addition, the Board of Lake County Commissioners also reserves the right to consider the contractor's integrity, past performance record, and financial/technical resources in making its decision as to which proposal is the most advantageous to the County.

The first phase of this process will be to review and confirm that all proposals submitted comply with the format and content requirements specified in Section 4 of the RFP. Some common elements that may constitute grounds for rejection of the Vendor's proposal include but are not limited to:

1. Failure to sign all copies of the proposal;
2. Failure to submit three (3) copies for evaluation purposes;
3. Failure to submit a cost for each and every item required;

4. Failure to submit the proposal by the deadline;
5. Sending the proposal with postage due;
6. Failure to submit required 5% bond,
7. Taking exception or proposing additions to the Contract terms, conditions, or requirements of the RFP;
8. Taking exception to the mandatory technical terms, conditions, or requirements of the RFP;
9. Failure to submit Proof of Insurance forms; or
10. Failure to comply with statutory requirements.

As described in **SECTION 4 – PROPOSAL FORMAT AND SUBMITTAL**, the vendor must entirely complete and submit a bond, a "Form of Cover Page of Offeror's Proposal" as the first page of the proposal; executive summary; vendor profile; references; system overview; software technical requirements; cost summary; recommendations for support and on-going maintenance; implementation schedule; exceptions to the RFP; proof of insurance; delinquent property taxes affidavit; non-collusion affidavit; campaign contributions affidavit; terrorist organization affiliation affidavit; and Buy Ohio disclosure statement. If a Vendor fails to comply with any of these requirements, its proposal may be rejected.

The second phase of this process will be to evaluate the quality of the response and its proposed costs. The committee will review closely the required equipment and software and associated costs. Both the Vendor and its proposal will be examined to determine the capabilities of the company and the quality of the proposed system. Each section of the document will be examined closely. The proposed hardware and software and their associated costs are important in this proposal. Creative recommendations that further enhance the quality of the proposal will be favorably noted.

Lastly, the committee will investigate references for work performed by the company. If the County determines that any of the references provided could not be contacted or verified, or the information obtained during the course of the verification process negates the responses of the Vendor's proposal, the County may reject the Vendor's proposal. Further, the committee may interview the Vendor's project manager and possibly other personnel. The County may visit other installations that use the Vendor's products. Additionally, the County may choose to invite a Vendor representative to the County to review a demonstration of their proposed solution and to ask questions about the Vendor's response before a recommendation for award is made.

THE CONTRACT WILL BE AWARDED TO THE OFFEROR WHOSE PROPOSAL IS DETERMINED TO THE BE THE MOST ADVANTAGEOUS TO THE COUNTY, TAKING INTO CONSIDERATION THE EVALUATION FACTORS AND CRITERIA. THE BOARD OF LAKE COUNTY COMMISSIONERS RESERVES THE RIGHT TO REJECT ALL PROPOSALS AND WAIVE TECHNICALITIES IN ANY PROPOSALS.

SECTION 6 - TERMS AND CONDITIONS

6.0 The Contract

The Contract ("Contract") shall consist of the following in order of controlling priorities for priority in conflict between documents:

1. *Any addenda issued by the County;*

2. *The Request for Proposals ("RFP") for Property Tax Accounting Software integrated with Computer Assisted Mass Appraisal Software and Implementation Services;*

3. *The selected Vendor's response document to the RFP;*

4. *The executed agreement for hardware, software, training, and maintenance services between the selected Vendor and Lake County, Ohio;*

5. *The purchase order issued under the Contract.*

6.1 Prime Vendor Responsibilities

The selected Vendor shall assume responsibility for all services and the system offered in the proposal whether or not it produces them. Further, the County will consider the selected Vendor to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the Contract.

6.2 Related Contracts

After award of the Contract, the Vendor shall not hire or use subcontractors not previously identified in the proposal without prior written approval from the County. No subcontractor may be used to create any custom software without prior approval by the County. Any contract must include "work made for hire" language for the benefit of ownership by Lake County, Ohio. No approval is required for the purchase of articles, supplies, components, or the procurement of mechanical services, provided those articles, supplies, components, or mechanical services do not include installation, programming, hardware, or other goods and services of the kind contemplated by the Contract. All work subcontracted shall be at the expense of the Vendor.

6.3 Time of Performance

This Contract shall be binding upon both parties upon receipt by the Vendor of a fully signed copy of the Agreement for Services and receipt of a County purchase order.

6.4 Terms and Conditions

All pricing, terms and conditions submitted in the Vendor's responses shall remain firm for a period of one hundred fifty (150) calendar days after the scheduled RFP due date or a contract is signed, whichever is sooner.

6.5 Record Keeping Requirements

The Vendor shall maintain all financial records in a manner consistent with generally accepted accounting principles. Documentation to support each action shall be filed in a manner allowing it to be readily located.

All disbursements made for the Contract shall be for obligations incurred in the performance of this Contract and shall be supported by contracts, invoices, vouchers, and other data appropriate to support the disbursements.

All disbursements for the Contract shall be for obligations incurred only after the effective date of the Contract, unless specific authorization for prior disbursements has been given in writing by the County.

During the period covered by this Contract and until the expiration of three (3) years after final payment under the Contract, the Vendor agrees to provide the County, its duly authorized representative, and any person, agency, or instrumentality providing the County with financial support to the work undertaken hereunder with access to and the right to examine any books, documents, papers, and records of the Vendor involving transactions related to the Contract.

6.6 Entire Agreement

BY SUBMITTING A PROPOSAL, THE VENDOR ACKNOWLEDGES THAT IT HAS READ THIS RFP, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS REQUIREMENTS, TERMS AND CONDITIONS. THE VENDOR FURTHER AGREES THAT THE CONTRACT, AS OUTLINED IN THIS DOCUMENT IS THE COMPLETE AND EXCLUSIVE STATEMENT OF THE AGREEMENT BETWEEN THE PARTIES AND SUPERSEDES ALL PROPOSALS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATION BETWEEN THE PARTIES RELATING TO THE SUBJECT MATTER OF THE CONTRACT. THE CONTRACT MAY BE MODIFIED ONLY IN WRITING, SIGNED BY THE VENDOR AND THE COUNTY. THE COUNTY RESERVES THE RIGHT TO DISQUALIFY ANY PROPOSALS THAT TAKE EXCEPTION TO OR LIMIT THE RIGHTS OF THE COUNTY UNDER THE REQUIREMENTS, TERMS, AND CONDITIONS OF THE RFP. FURTHERMORE BY PROVIDING THE COUNTY WITH A PROPOSAL BASED ON THE RFP, THE VENDOR EXPRESSLY WARRANTS THAT THE VENDOR'S PROPOSED SYSTEM WILL FULFILL THE REQUIREMENTS OF THE RFP EXCEPT AS SPECIFICALLY EXCEPTED BY VENDOR. SUCH EXCEPTIONS AFFECT CONSIDERATION OF DETERMINATION OF THE BEST VENDOR.

6.7 Conflicts of Interest

No personnel of the Vendor or member of the governing body of any locality, or other public official or employee of any such locality in which, or relating to which, the work under this Contract is being carried out, and who exercises any functions or responsibilities in connection with the review or approval of the undertaking or carrying out of any such work, shall prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible, or in conflict with the discharge and fulfillment of such person's functions and responsibilities with respect to the carrying out of said work.

Any person who acquires an incompatible or conflicting personal interest, prior to, on, or after the effective date of this Contract, or who involuntarily acquires incompatible or conflicting personal interest, shall immediately disclose that interest to the County in writing. Thereafter, such person shall not participate in any action affecting the work under this Contract, unless the County determines that, in light of the personal interest disclosed, such person's participation in any such action would not be contrary to the public interest.

6.8 Headings

The headings used in this RFP are for convenience only and shall not affect the interpretation of any of the terms and conditions.

6.9 Governing Law - Severability

The validity, construction, and performance of this RFP and the resulting Contract and the legal relations among the parties to the RFP and resulting Contract, shall be governed by and construed in accordance with the laws of the State of Ohio, including, without limitation, case law and administrative rules. Venue shall only be proper in Lake County, Ohio. If any provision of the RFP and resulting Contract or the application of any such provision shall be held by a County of competent jurisdiction in Ohio to be contrary to law, the remaining provisions of the RFP and resulting Contract shall remain in full force and effect.

6.10 Compliance with the Law

The Vendor agrees to comply with all applicable federal, state, and local laws in the conduct of the work under this Contract. The Vendor accepts full responsibility for payment of all taxes and insurance, including workers' compensation insurance premiums, unemployment compensation insurance premiums, all income tax deductions, and social security deductions for all work authorized by this Contract.

6.11 Responsibility for Claims

The Vendor agrees to indemnify, defend, and hold harmless the County, its officers, agents, and employees from any and all liabilities, claims and losses resulting to any person, firm, or corporation who may be injured or damaged by the wrongful or negligent malfeasance, misfeasance, or nonfeasance of the Vendor's employees and the Vendor's products in the performance of the Contract.

6.12 No Additional Waiver Implied

If the County or the Vendor fails to perform an obligation or obligations under the Contract and that failure subsequently is waived by the other party, the waiver shall be limited to the particular failure so waived. Waiver by the County shall not be effective unless it is in writing.

6.13 Default by the Vendor

The County declares and the Vendor acknowledges that the County may suffer damages resulting from the failure of the Vendor to act in accordance with the requirements, terms and conditions of the Contract. The Vendor agrees that the County has not waived any of its rights or remedies concerning the failure of performance by the Vendor unless the County executes a written waiver of rights or remedies.

Unless expressly stated elsewhere in the Contract, the Vendor agrees that it shall correct any failure of performance within ten (10) working days of written, oral or actual notice thereof. If the Vendor does not correct the failure or failures within the ten (10) working days, the failure or its lack of correction shall constitute default on the part of the Vendor.

If, by reason of force majeure, the Vendor is unable in whole or in part to perform under the Contract, the Vendor shall not be deemed in default during the continuance of such inability. As used in this document, the term "force majeure" means without limitation: acts of God; acts of public enemies; insurrection; riots; epidemics; lightning; earthquakes; fire; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; and explosions. After the force majeure has ceased, the Vendor shall remedy with reasonable dispatch its obligation(s) contained herein.

In the event the Vendor is unable to act in accordance with the Contract for a period of ten (10) working days by reason of force majeure, the County shall have the right at its option to terminate the Contract and retains any part of the system that has been accepted upon payment by the County to the Vendor for such part of the system.

6.14 *Vendor Limitation of Liability and Remedies*

The Vendor's entire liability and the County's sole and exclusive remedies for claims related to or arising out of the Contract for any cause and regardless of the form of action, whether in contract or in tort, shall be as set forth in the Contract, including all legal and equitable remedies.

In the event of default as defined in Section 6.13 the Vendor agrees to reimburse the County for any actual and direct damages or actual and direct losses incurred by the County. In the event that direct losses or direct damages are uncertain or difficult to ascertain, the Vendor agrees to pay the County liquidated damages in the amount calculated by using the not-to-exceed fixed price amount in Section 8, the Cost Summary, divided by 180 which yields a per day amount. Said payments shall accrue from the first day of a default, until the day that it is agreed to by the Vendor and the County that the default has been remedied, or until 180 days from the first day of default, whichever is sooner. The Board may, in writing, waive or delay the accrual of liquidated damages. In addition, the Vendor agrees that the County shall have the right to terminate the Contract, either in whole or in part, without liability to the County. The Vendor agrees that the calculated amount per day is not a penalty.

No delay or omission to exercise any right or option accruing to the County upon any default by the Vendor shall impair any such right or option or shall be construed to be a waiver thereof, but any such right or option may be exercised from time to time and as often as may be deemed expedient by the County.

NOTWITHSTANDING ANY LANGUAGE TO THE CONTRARY, THE VENDOR SHALL BE LIABLE FOR ANY PERSONAL INJURY OR DAMAGE TO REAL PROPERTY OR TANGIBLE PERSONAL PROPERTY, CAUSED BY THE FAULT OR NEGLIGENCE OF THE VENDOR.

6.15 *Indemnity*

At its own expense, the Vendor shall defend any suit brought against the County, including, but not limited to, its public officials and County employees, based on a claim that the system or any part of the system furnished under this Contract infringes a United States Patent or Copyright or constitutes misuse or misappropriation of a trade secret, provided the Vendor is given prompt notice in writing of the suit and is given authority and information required for the defense of same. The cost of any suit, or damages for which the County is liable that are attributable to the claim, shall be borne by the Vendor.

If the system or any part of the system furnished is likely to or does become subject to a claim of infringement of a United States Patent or Copyright or constitutes misuse or misappropriation of a trade secret, at its own expense, the Vendor shall do one of the following:

1. Obtain the right for continued use of the system or part of the system by the County;

2. Modify or furnish a substitute for the alleged infringing system or part of the system for the County;

3. Take back the system or part of the system subject to the County's concurrence, and issue a refund to the County for the depreciated value of the system or part thereof, calculated on a straight-line basis over six years.

Vendor shall not have any liability to the County under this indemnity clause for any claim that is caused by use of any system or part of the system in any manner for which it was not designed or by modifications to the Application Software by the County without the Vendor's approval.

THE FOREGOING STATES VENDOR'S ENTIRE LIABILITY AND THE COUNTY'S SOLE REMEDIES FOR ANY LOSS OR DAMAGE ARISING FROM INFRINGEMENT.

6.16 Assignment

Neither this Contract, nor any rights, duties, nor obligations described in this Contract, shall be assigned by either party without the prior written consent of the other party.

6.17 Cancellation of Contract

The County reserves the right to cancel the Contract at any time, without cause, upon two (2) weeks written notice to the Vendor. At any time should the County be dissatisfied with services received by the Vendor's personnel, the County, in addition to the other remedies set forth in the Contract, shall have the right to request replacement personnel that the Vendor shall provide at no additional cost to the County. The Vendor agrees to honor all such requests and replace personnel within ten (10) calendar days of written notice. The replacement personnel shall be comparably qualified and acceptable to the County, which shall have the opportunity to interview replacement personnel before selection. The County shall have approval as to all personnel replaced under both paragraphs of this Section.

Unless the County terminates the Contract as provided in this section, the Vendor shall not remove any personnel without thirty (30) days prior written notice to the County. The Vendor shall be prepared to replace such personnel. At least two (2) resumes for replacements shall be supplied within five (5) days of notifications to the County that personnel are being removed or receipt of a request from the County to remove personnel. The Vendor's obligations under the Contract shall continue notwithstanding the fact that Vendor personnel are being removed or receipt of a request from the County to remove personnel. If the Vendor fails to give the notice required by this section, or if the replacement personnel are unacceptable, the County shall have the right to terminate this Contract or demand new personnel as specified above and the Vendor agrees to reimburse the County for all damages and expenses associated with locating replacement personnel. The rights and remedies of the County set forth in this section shall not be exclusive of any other rights or remedies of the County arising under the Contract or by operation of law.

6.18 Ownership

The Vendor hereby assigns, transfers, and conveys to the County all rights, title, and interest in any computer software, systems design, source code, object code, work papers, and all other information, documents and material prepared by the Vendor for or in connection with the Contract. Computer software, systems design, source code, and all other information, documents, and materials prepared for or in connection with the Contract by the Vendor's personnel shall become the property of the County. Work papers pertaining to the tasks and

reports shall be made available, upon request, to the County project manager or his or her representative for review, inspection, and, if desired, reproduction. Work papers shall be retained for at least three (3) years subsequent to the final payment required under the Contract. Under no circumstances can the Vendor prohibit or take any action to withhold any data related to the County's software system from the County or the public. If this agreement should be terminated, the County will be provided a reasonable time period no less than six (6) months to transfer data. **The County owns all data and at no time in a dispute can the Vendor use data as a dispute item.**

In addition, the Vendor shall grant to or obtain for or on behalf of the County a perpetual, non-revocable, non-transferable, and non-exclusive license to use the software and documentation related thereto for each CPU provided hereunder unless otherwise stated herein. Such documentation shall include all operator and user manuals, training materials, programmer reference manuals, system administration guides, listings, specifications, and other materials necessary for the proper and successful use of the software. The Vendor shall deliver to the County three (3) complete copies of the documentation.

The County shall have the right, as part of the license granted hereunder, to make as many additional copies of the documentation as the County deems necessary. The County may make one (1) backup or archive copy of the software for the installation site.

6.19 Travel Expenses

Any travel or per diem required by the selected Vendor to carry out its obligations under the Contract shall be identified as separate line items wherever they appear in the bid. Prior to the successful vendor performing on-site work, the County will solicit reputable local hotels/motels for a "locked-in" nightly rate for the duration of the contract. The County will then provide the successful vendor with a list of allowable local establishments, and their nightly rates (excluding any taxes), that the vendor can choose from. Should the vendor select an establishment not listed by the County, the vendor is responsible for any additional nightly charges (and associated taxes).

6.20 Method of Purchase / Billing

A Purchase Order shall be issued to purchase from the Contract.

All line items that appear on any invoice for this RFP must have receipts or other appropriate documentation to support the expenditure and must be available upon request.

Vendor shall submit an invoice to the "Bill To" address on the purchase order. A proper invoice must include the following information and/or attached documentation:

1. Name, address and federal tax identification number of vendor as designated in the Contract.

2. Invoice remittance address as designated in the Contract.

3. For hardware and software, the description of the deliverable, serial number when applicable, unit price, quantity and total price of the deliverable actually delivered or rendered as specified in the Contract.

4. For implementation services, the description of the service, name of implementer providing
service, time period of service, hours billed, unit charge, extended cost, breakdown of applicable expenses (airfare, lodging, meals, mileage, etc.),

Payments under the Contract shall be due on the forty-fifth (45^{th}) calendar day after the later of the date of actual receipt of a proper invoice in the office designated to receive the invoice or the date the system, materials, goods, supplies, or services are accepted in accordance with the terms of the Contract. The date of the check issued in payment shall be considered the date payment is made. Vendor payment shall not be initiated before an invoice is received.

The Vendor will invoice the County as follows:

1. After complete and successful installation, fifty percent (50%) of the not-to-exceed, fixed price for hardware and software as identified in the Section 8 - Cost Summary can be billed to the County provided that the Lake County Information Technology Director attests that the system is functioning acceptably.

2. Following complete and successful installation, the remainder of the not-to-exceed, fixed price for hardware and software as identified in the Section 8 - Cost Summary can be billed to the County provided:

   A. Successful completion of training has occurred;
   B. A successful sixty day performance period has been achieved (Section 6.21); and
   C. The Lake County Information Technology Director formally accepts the system as defined in section 6.21.

3. Implementation services can be billed as incurred by the Vendor.

6.21 Standards of Performance and Acceptance

System acceptance is dependent upon a sixty (60) day successful standard of performance as defined herein.

This section also applies to the system or part thereof submitted for product evaluation as well as replacement or substitutes for the system and the system which is field modified after the installation site has completed a successful Performance Period.

1. The Performance Period shall begin on the date of complete and successful installation and shall end when the system has met the standard of performance identified in this RFP for a period of sixty (60) consecutive days by operating in conformance with the Vendor's technical specifications (as set forth in the Vendor's operations manual for the system ordered or as quoted in the Vendor's proposal) and in conformance with this RFP. The County, through its Information Technology Director, will determine if, and when, a successful Performance Period has been achieved based upon the functionality of the software and all related modules.

2. In the event the system does not meet the standard of performance during the initial sixty (60) days, the standard of performance test shall continue on a day-by-day basis until the standard of performance is met for a total of sixty (60) consecutive days.

3. If the system fails to meet the standard of performance after ninety (90) calendar days from the start of the Performance Period, the Vendor shall be in default. The Vendor shall have ten (10) working days to remedy such default notwithstanding Section 6.13. Such default shall only be remedied when the County agrees that a successful performance period has been completed. In addition to all the other rights and remedies conferred to the County under the Contract (Section 6.14), the County reserves the right to request replacement of the system or terminate the order.

4. System downtime is that period of time when any part of the system is inoperable due to failure.

5. During a period of downtime, the County may use operable components of the system when such action does not interfere with repair of inoperable components of the system.

6. Downtime shall start from the time the County notifies the Vendor's designated representative of the inoperable system until the system is returned in proper operating condition (rounded to the nearest quarter hour).

7. The system shall not be accepted nor the balance of charges paid until the Performance Period is complete.

8. Uptime and downtime shall be measured in hours and quarter hours.

9. Should it be necessary, the County may delay the start of the Performance Period, but such delay shall not exceed thirty (30) consecutive days after the installation date. Unless otherwise mutually agreed to by the County and the Vendor, the Performance Period must start not later than the thirty-first (31st) day after the installation date.

6.22 *Software Warranty*

During the five (5) year maintenance period identified in the maintenance proposal of Section 8, the Cost Summary, which begins from the date of Acceptance of the software, Vendor warrants that when the software is delivered and installed, it will operate on the specified computer(s) in the manner as described in the relevant software documentation, in the vendor's RFP response, and in the Contract as defined in Section 6.0.

For a period of three years after the date of acceptance of the software, Vendor warrants that it shall:

A. Maintain the software to operate in a manner as described in the relevant software documentation, the Vendor's proposal, and the RFP;

B. Supply technical bulletins and updated user guides as they become available;

C. At the discretion of the County, supply the County with newer versions, updates, improvements, enhancements or modifications to the software and documentation purchased from the Vendor including all applications, utilities and development tools as they become available;

D. Correct or replace the software and/or remedy any programming error (which is attributable to the Vendor); and

E. Service the software in a professional manner with qualified personnel.

The Vendor shall provide updated software documentation upon delivery of updated software releases. The Vendor acknowledges that said newer versions, updates, improvements, enhancements, and modifications to the software or documentation shall be subject to the provisions of the Contract.

The Vendor warrants that it shall exert its best efforts to correct a programming error, which is attributable to the Vendor, provided that the County notifies the Vendor of a problem with the software orally or in writing, and that the County provides information sufficient to identify the problem. Such information includes, but shall not be limited to: error diagnostic messages, diagnostic memory dumps, operator console log, data file dumps, application program listing, and other written explanation and documentation of said problem.

6.23 *Equal Employment Opportunity*

In carrying out the Contract, the Vendor shall not discriminate against any employee or applicant for employment because of race, religion, national origin, color, sex, sexual orientation, age, handicap, or military veteran status. The Vendor shall ensure that applicants are hired, and that employees are treated during employment, without regard to their race, religion, national origin, color, sex, sexual orientation, age, handicap, or military veteran status. Such action shall include but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeship.

The Vendor agrees to post in conspicuous places available to employees and applicants for employment, notices setting forth that the Vendor complies with all applicable federal and state nondiscrimination laws. In all solicitations or advertisements for employees placed by or on behalf of the Vendor, the Vendor shall state that all qualified applicants will receive consideration for employment without regard to race, religion, national origin, color, sex, sexual orientation, age, handicap, or military veteran status. The Vendor shall incorporate the foregoing requirements of this paragraph in all of its contracts for any of the work prescribed in this Contract (other than subcontracts for standard commercial supplies or raw materials), and will require all of its subcontractors for any part of such work to incorporate such requirements in all subcontracts for such work.

SECTION 7 – SOFTWARE MINIMUM REQUIREMENTS

7.0 Introduction

All vendors are required to complete this **SOFTWARE MINIMUM REQUIREMENTS** section.

It is the assumption of this RFP that the Vendor will supply a fully functional integrated property tax accounting software application and CAMA software application designed to reasonably fulfill the enterprise needs of Lake County, Ohio. Therefore, this section, **SECTION 7 – SOFTWARE MINIMUM REQUIREMENTS**, is not intended to be an all-encompassing, all-inclusive statement of every functional need but rather a highlight of those functions of particular interest.

If the proposed Vendor has not already developed a fully functional software application designed to reasonably fulfill the enterprise needs of Lake County, Ohio, it is the responsibility of the Vendor to determine those needs and to provide just such an application.

In the space provided by each question, make one of the following responses:

Y = "**Y**ES": full and complete compliance by Vendor's system
N = "**N**O": feature is not provided in Vendor's system
M = "**M**ODIFICATION": feature can be provided by means of custom modification and the vendor will modify software to provide this requirement as part of the bid price
C = "**C**HANGE": the Vendor does not recommend the feature, function or method and suggests the County change its practices concerning the item

*In cases where you respond with "**C**", please provide an explanation as to why.*

7.1 Application Environment Minimum Requirements

_____ 1. All system administrator functions shall have a graphical user interface (GUI).

_____ 2. Memory, disk utilization and CPU utilization shall be monitorable.

_____ 3. System files shall be shareable by multiple workstations simultaneously.

_____ 4. Multiple users shall be able to share the same copy of the application software.

_____ 5. Software should accommodate a back-up that will initiate after normal business hours and run unattended. The vendor is required to disclose any third party software agents needed to perform backups.

_____ 6. The system shall provide both full and incremental backup and restore capabilities for all databases and office suite documents.

_____ 7. During system backup, record updating shall be locked, but with the ability to retrieve.

_____ 8. The system must be user-friendly and designed to lead users systematically through each procedure. The system shall permit the user to "jump" or "fast path" directly to specific screens within an application. In addition, input errors should be indicated at the time of entry, along with the appropriate response requirement.

_____ 9. System security shall utilize multilevel password techniques to restrict unauthorized use of the system, provide read only access, secure supervisory functions and restrict file access by user identification code and user password. In addition, the system shall journal all transactions to a log file for transaction logging. All log files older than fifteen (15) days will be automatically deleted so the disk storage does not get consumed with unnecessary log files. The vendor may recommend a different time period other than fifteen days.

_____ 10. System shall provide on-line help features.

_____ 11. The system shall provide the ability to spool output to the printer while other tasks are performed.

_____ 12. The system shall provide the ability to export data to Microsoft Office applications and to ASCII format.

_____ 13. The data storage component shall conform to the Open Database Connectivity (ODBC) application program interface standard.

_____ 14. The data storage component shall be accessible via Structured Query Language (SQL). The County standard is any current Microsoft SQL Server; however, the County would prefer the most current version.

_____ 15. The application shall have a web interface "front end" that runs under the current versions of Microsoft Internet Explorer or Google Chrome.

_____ 16. The system must provide the ability to prepare data tapes and/or other media types, (i.e. disk, CD, etc. of the various data files).

_____ 17. The system must provide the ability to upload data to the County's website daily for property taxes (DDTI site). The vendor is responsible for creating the interface and/or script files for automatic transfer of data to DDTI web site. DDTI is a third party web host that provides the public facing web site of the real estate data http://www.lake.iviewauditor.com/.

_____ 18. Requiring editing of the Windows registry is strongly discouraged.

_____ 19. The County extensively uses virtual server technology (VMWare). The proposed solution must be able to operate in this environment. The County IT Department will be responsible for maintaining the virtual and physical servers.

7.2 General System Requirements - All Application Software

_____ 1. The system will functionally meet the Ohio Revised Code and Ohio Administrative Code statutory requirements associated with real property, manufactured homes and property assessment as currently implemented in the County while also utilizing appraisal standards as set by the International Association of Assessing Officers (IAAO).

_____ 2. The software proposed for this request for proposal must be installed in at least two (2) Ohio Counties for a period of two (2) prior consecutive tax years.

_____ 3. The total operational environment must support a minimum of sixty (60) concurrent users within the County.

_____ 4. The system provided by the vendor must include the complete functionality as defined by the proposal.

_____ 5. The system MUST be a true multi-year system with the ability to store multiple years of historical data while allowing for on-line retrieval of such data including, but not limited to, ownership, valuations, taxes due, payments made, property characteristics, etc.

_____ 6. The system must be able to accommodate the parcel counts, valuations and other levels as disclosed in Section 2.2, "General Property Tax Statistics for Lake County".

_____ 7. The system must be able to accommodate the County's current parcel numbering format (e.g. 13-A-037-C-02-123-A) (Please note: alpha characters can be used in positions 3, 7 and 13).

_____ 8. The system must provide for search capabilities by parcel number, owner and address.

_____ 9. The system must provide the ability to enter unlimited notes.

_____ 10. The system must provide "audit trails" of all changes performed in the system so as to provide quality control and production monitoring of data entry personnel.

_____ 11. Data entry by the user must permit tabbing or other technique for speedy entry into the system. The system must accommodate the input capacity of the County's fastest data operator.

_____ 12. The system must have the capability to "toggle" between multiple sessions/windows of the same application on the same workstation.

_____ 13. The system must have the capability to generate screen prints from any screen.

_____ 14. The system must be user-friendly and designed to lead users systematically through each procedure. The system shall permit the user to "jump" or "fast path" and move directly to specific screens within the selection medium. In addition, input errors should be indicated at the time of entry, along with the appropriate response requirement, and the ability to print error messages.

_____ 15. System security shall utilize multilevel password techniques to restrict unauthorized use of the system, provide read only access, secure supervisory functions, and restrict file access by user identification code and user password.

_____ 16. System shall provide easy selection functions, and all workstations must be capable of performing all application functions or selections.

_____ 17. System shall provide the ability to spool output to the printer while other tasks are performed on the video display.

_____ 18. System shall provide the ability to export data to Microsoft Office applications and to ASCII format and be able to download to diskette/CD/DVD/USB flash memory drive.

_____ 19. System shall provide on-line help features.

_____ 20. The system should display a help window on all data fields including context sensitive help on all codes (i.e., if a user enters "CAT" and presses the HELP key, the top line of the help window will display codes starting with CAT.)

_____ 21. System files shall be shareable by multiple workstations simultaneously.

_____ 22. Multiple users shall be able to share the same copy of the application software.

_____ 23. Historical Data to be brought forward: The system should carry all values currently in tax (1996 forward) and all CAMA data (1999 Forward).

_____ 24. The system should have a tablet application for field staff to do data collection in the field and/or remotely. Currently the county has 5 field staff. The county will purchase tablets at the discretion of the Auditor and IT department for use. Bidders should make recommendations as to the tablet specifications required to run the CAMA tablet application.

7.3 General System Requirements - Reporting

_____ 1. The system must produce all property tax and appraisal reports required by the Ohio Revised Code, the Ohio Administrative Code and the Ohio Department of Taxation. Such reports include, but are not limited to, tentative abstract, final abstract, exempt abstract, CAUV abstract, new construction, sales ratios, special assessments by project, tax duplicates, building permits (by district, date, field appraiser), manufactured homes, homestead and rollbacks, settlement and apportionment, top taxpayers and delinquencies. The system should accommodate the Treasurer's Office which is required by the State Auditor's Office to generate a report when tax bills are created and for the last day of payment processing. The Treasurer's Office also requires that the system be able to create reports to track tax lien certificates.

_____ 2. The system must produce the required sales file extract for the Ohio Department of Taxation.

_____ 3. In addition to the various reports that come with the software, the system shall provide a customizing, easy-to-use report generator.

_____ 4. All data should be accessible to produce ad hoc reports in a format requested by the operator, based on defined user permissions.

_____ 5. It is preferred that all reports be able to be exported into Microsoft Excel-type spreadsheet files.

7.4 Application Requirements – Parcel Maintenance

_____ 1. The system must provide the ability to add new and delete/deactivate parcels numbers.

_____ 2. The system must allow for three (3) addresses (owner(s), location and tax mailing) for each and every parcel. The County strongly prefers "parsed" address fields, meaning that street number, street name, street type (rd., st., lane, etc.), street direction, etc. all be stored in separate fields.

_____ 3. Parcel maintenance of the owner and location addresses must be restricted to the Auditor's Office and maintenance of the tax billing address must be restricted to the Treasurer's Office.

_____ 4. If property valuations are included in a "base" parcel screen, such valuations must be populated by the CAMA system. In addition, the system must provide for the ability for valuations to be changed manually solely by the Auditor's Office.

_____ 5. The system must allow for the storing of both agricultural use value (CAUV) and market value for the same land.

_____ 6. The system must provide the ability to change the mailing address on multiple parcels

with the same owner without having to type in the new address for each parcel. The ability to copy a mailing address would accomplish this task.

_____ 7. The system must provide the ability to comply with House Bill 46 (effective 9/1/2008), which requires the names of certain public safety workers, if they so desire, to be replaced with their initials on all tax records. Therefore, it is preferred that the system provide for "actual" name fields (full names) and "redacted" name fields (initials only). The ability to view these fields or not should be controlled by the individual user sign-ons. If separate fields are not provided for by the system, the vendor must disclose in writing (as an addendum to, or as part of, their bid response) how their system complies with HB46.

7.5 Application Requirements – Transfers/Conveyances

_____ 1. The system must provide the ability to hold multiple owners name and percentage of ownership.

_____ 2. The system must provide the ability to calculate the appropriate conveyance/transfer tax.

_____ 3. The system must provide a cashiering system to record all fees associated with transfers/conveyances.

_____ 4. The system must provide the ability to produce daily, monthly and annual reports of all transfers/conveyances by class and taxing district.

_____ 5. The system must provide the ability to designate sales per property on associated split properties.

_____ 6. The system must provide the ability to maintain on-line split history by parcel.

_____ 7. The system must provide the ability to retire/deactivate the parent/mother parcel(s) as necessary.

7.6 Application Requirements – Property Tax Billing

_____ 1. The system must be able to create a bill file that is compatible with the current vendor "SmartBill". The system must also be able to create tax bills in office as needed that have the same appearance as the vendor produced bills.

_____ 2. The system must be able to produce and mail real estate and manufactured home tax bills.

_____ 3. The system must be able to produce tax charge "bank" files, per institution, of all parcels whose taxes are paid via banking and lending institutions.

_____ 4. The system must be able to produce property tax bills that have an OCR code. The ability to imprint a bar code to be scanned at the time of recording payments should be proposed and explained in any proposal as an option.

_____ 5. The system must be able to produce a tax billing duplicate, as required by the Ohio Revised Code.

_____ 6. Mortgage company bills and owners' bills that have multiple properties must be able to be identified with the Treasurer's bank code and sorted and printed by bank code.

_____ 7. The system must be able to produce a batch of sample tax bills for each billing period for quality control review purposes. This sample batch must be a cross-section of various property classes and taxing districts.

_____ 8. Tax billing calculation must apply the appropriate late penalty and interest charges according the requirements of the Ohio Revised Code.

7.7 Application Requirements – Property Tax Collections and Cashiering

_____ 1. The cashiering system must be able to validate/credit payments received to the respective parcel(s) on an on-line, real-time basis.

_____ 2. The cashiering system must allow for multiple business days to be open at the same time.

_____ 3. The cashiering system must allow for independent balancing, reporting and closeout of multiple cash drawers and sessions at any time without affecting other operations.

_____ 4. The cashiering system must provide the ability to correct payments that are keyed in error or applied incorrectly to the correct parcel.

_____ 5. The cashiering system must provide the ability to update, process and reconcile all payments at any time throughout the business day.

_____ 6. The system must provide tellers with on-line, real-time balances due, so as to include all adders, remitters and payments.

_____ 7. The cashiering system must provide the ability to allocate one payment amongst multiple parcels.

_____ 8. The cashiering system must allow for all types of tax payments (including credit card payments) as well as general receipt payments (pay-in orders).

_____ 9. The cashiering system must calculate and display to the teller the amount of change owed to the customer.

_____ 10. The cashiering system must inform the tellers about any unposted money prior to closing that transaction.

_____ 11. The cashiering system must provide the ability to void receipts including those payments that become NSF. The system should be able to generate a letter due to an NSF situation.

_____ 12. The cashiering system must provide the ability to balance a teller's drawer according to the type of payment (cash, check, etc.).

_____ 13. The system should allow for cashiers to be able to accept and post payments after the close of a tax period/half, during settlement of that tax period/half.

7.8 Application Requirements – Tax Billing Adjustments (Adders/Remitters)

_____ 14. The system must provide the ability to automatically calculate tax adjustments based upon changes in property valuations and/or property classifications.

_____ 15. The system must provide the ability to manually compute and enter tax billing adjustments to any charge.

_____ 16. The system must display and store tax billing adjustments separately from original charges.

_____ 17. The system must provide the ability to view any and all individual tax billing adjustments on-line at any time.

_____ 18. The system must provide a report(s) when tax billing adjustments result in a refund due the property owner. Such report should include the parcel number, owner name, mailing address and refund amount.

7.9 Application Requirements – Special Assessments

_____ 1. The system must provide the ability to maintain special assessments by political subdivision using the County's current special assessment coding scheme (e.g. 30-150).

_____ 2. The system must provide the ability to calculate and apply special assessments using various calculation methods such as periodic fixed amounts, straight declining, variable declining, multi-year fixed and also calculates using the assessed valuation multiplied by a fixed rate.

_____ 3. The system must provide the ability to input special assessments at a minimum of thirty (30) years into the future.

_____ 4. The system must provide a "pay-off" amount for future special assessments for any given parcel on an on-line basis.

_____ 5. The system must provide the ability to view any and all current special assessments for any given parcel on an on-line basis.

_____ 6. The system must provide reports which can summarize future annual assessments by assessment type and assessment code.

_____ 7. The system must provide reports which can summarize parcels with delinquent special assessments within taxing districts.

7.10 Application Requirements – Owner-Occupied Credit (Homesite)

_____ 1. The system should provide ability to determine parcels eligible for the owner-occupied program.

_____ 2. The system must provide the ability for the Auditor's Office to maintain the homesite value eligible for the owner-occupied program.

_____ 3. The system must be able to calculate the appropriate tax credit for properties receiving the owner-occupied credit.

_____ 4. The system must be able to produce the required report, of all parcels receiving the owner-occupied credit, for the State of Ohio which entitles the County to receive its owner-occupied credit reimbursement.

_____ 5. It would be preferred if the system could flag multiple parcels with the same owner name that are receiving the owner-occupied credit.

7.11 Application Requirements – Homestead Exemption Program

_____ 1. The system must provide for applicant's date of birth and it would be preferred if the applicant's spouse's date of birth could also be maintained.

_____ 2. The system must be able to indicate disabled applicants and maintain this status.

_____ 3. The system must be able to calculate the appropriate homestead program credit on a parcel by parcel basis.

_____ 4. The system must be able to maintain the income amount required by HB 49.

_____ 5. The system must provide for entry of applicant information for those who do not qualify until the next tax year.

_____ 6. The system must be able to handle the Homestead Exemption for applicants that qualify under HB 85.

_____ 7. The system must be able to produce the required report, of all parcels receiving the homestead exemption credit, for the State of Ohio, which entitles the County to receive its homestead reimbursement. The report should be stratified by taxing district.

7.12 Application Requirements – Current Agricultural Use Value (CAUV) Program Ohio Forest Tax Law Program (OFTL), Agricultural District, Minerals (Gas and Oil)

_____ 1. The system must provide for the management of all data and production of documents utilized in the CAUV and OFTL programs.

_____ 2. The system must provide for the production of CAUV renewal mailing notices.

_____ 3. The system must provide for a minimum three-digit code for agricultural district owners.

_____ 4. The system must be able to calculate any respective recoupment charges, including value breakdowns by soil type.

_____ 5. The system must allow for entry of all data from DTE6A Form for Gas and Oil production.

7.13 Application Requirements – Exemption, Abatements and Tax Increment Financing (TIF)

_____ 1. The system must provide the ability to designate individual parcels as tax exempt, tax abated or as included as part of a TIF agreement.

_____ 2. The system must be able to calculate and display taxable valuations versus exempt valuations for any and all parcels that are exempt, abated or TIF parcels.

_____ 3. The system must be able to calculate and correctly distribute taxes to the respective political subdivisions for any and all parcels involved in TIF agreements.

_____ 4. The system must be able to produce the exempt abstract, as required by the Ohio Revised Code.

7.14 Application Requirements – Board of Revision (BOR)

_____ 1. The system must provide the ability to assign case numbers (up to 15 characters) to all BOR parcels.

_____ 2. The system must provide the ability to allow multiple parcels on a single case number.

_____ 3. It would be preferred if a BOR case could be queried by owner/complainant name, case number or parcel number.

_____ 4. The system must provide the ability to produce all notification letters to owners, school boards and any other associated party within the statutory time frame, all of which is required by the Ohio Revised Code. It is greatly preferred that the system allow for the County to create its own letters for various scenarios that could be produced by possibly accessing a table of all available letters.

_____ 5. The system must provide the ability to schedule hearings and allow for multiple hearing locations.

_____ 6. The system must be able to provide daily hearing schedules.

_____ 7. The system must be able to provide BOR decision letters for all applicable parties.

_____ 8. The system must be able to produce U.S. Postal Service certified mailing certificates for all required certified mailings related to the BOR.

_____ 9. It would be preferred if the system could provide the ability to resolve multi-year BOR decisions and automatically calculate adders/remitters and tax bills/refunds.

_____ 10. The software must generate letters that are formatted to fit in a standard window envelope showing the mailing address in the window.

_____ 11. The system must be able to track the status of all BOR cases at any given time.

_____ 12. The system must be able to produce any and all forms required by the Board of Tax Appeals, Common Pleas Courts, and/or the Ohio Supreme Court.

_____ 13. The system must allow the importation of a scanned signature(s) and placement of signature on all correspondence letters.

_____ 14. The system will have the ability to run reports by school district to identify those B.O.R. cases that are seeking a change over $50,000 in market value per O.R.C. and sort such a report by attorney, complainant, or by area so as to coordinate hearings for multiple complaints filed by the same attorney or owner.

_____ 15. The system will have the ability to export a mailing list for purposes of doing mail merges and creating file labels.

7.15 Application Requirements – Settlements and Apportionment Sheets

_____ 1. The system must provide the Treasurer's Form 6.

_____ 2. Once each respective tax collection period is closed and all payments have been processed and posted by the Treasurer's Office, the system must provide summary collection reports to be used to balance total collections to the Form 6 and to the Auditor's cash balance for the respective tax fund for that period.

_____ 3. The system must provide apportionment sheets, and exports to the apportionments sheets from the tax collection system, which detail the distribution of all tax collections by property class, levy and assessment to all political subdivisions. Distribution must be based on the tax rates in effect for each respective tax year.

_____ 4. The apportionment sheets must provide for allowable fees and charges such as County Auditor's and County Treasurer's fees, Real Estate Assessment fees, Prosecutor and Treasurer delinquent tax collection fees, etc. and other statutorily required or provided for fees.

_____ 5. The apportionment sheets must accept exports from the property tax system and must also be able to accept manual additions so as to provide flexibility to add new items as state and/or local legislation changes.

_____ 6. The system must be able to produce a report showing current and delinquent collections and amounts unpaid by class, taxing district, and political subdivision.

7.16 Application Requirements – Manufactured Homes

_____ 1. The system must allow for access/retrieval by registration number, owner name, owner address or serial number.

_____ 2. The system must provide the ability to tax manufactured homes either like real estate or using the depreciation method.

_____ 3. The system must provide for the maintenance of registration number and manufactured home parks codes.

_____ 4. The system must provide for the entry and storage of a sketch and salient data pertaining to the manufactured home that closely resembles regular real estate records.

_____ 5. The system should be able to produce a property card similar to real estate

_____ 6. The system will allow for the manufactured homes to be valued and maintained in the CAMA system.

_____ 7. The system must provide for similar functionality, as defined previously for the real estate system, pertaining to all areas of tax bills, tax adjustments (adders/remitters), penalties/interest, escrow capable, auto-pay capable, owner-occupied credit, homestead exemption, tax collections and cashiering, and settlement, in accordance with the Ohio Revised Code.

_____ 8. The system must fully integrate with the Treasurer's cashiering system to accept and record payments as required for real property.

_____ 9. The system will allow for manufactured homes to be processed in the Board of Revision system.

_____ 10. The system will allow for relocation and registration fines and penalties.

7.17 Application Requirements – Contracts/Escrow/Foreclosures

_____ 1. The system must be able to produce contract/payment plan bills and escrow bills.

_____ 2. The contract module/screen should have the ability to store the owner's phone number, initial date of contract, payment history and prior penalties and interest.

_____ 3. The system should allow for contracts to be defaulted upon the Treasurers Office request.

_____ 4. The system should allocate the delinquent charge amongst the remaining months in that respective tax period/half at the time when an owner enters into a contract.

_____ 5. The system must allow for a parcel to be on a contract and an escrow plan simultaneously.

_____ 6. The cashiering system must notify the teller if a parcel is on an escrow program, engaged in a delinquent payment plan or is in bankruptcy or foreclosure status. It is preferred that the system, not only notify the teller when a parcel is in foreclosure status, but also requires a manual override/response to continue processing a payment transaction.

_____ 7. The cashiering system must notify the teller if a delinquent payment plan or escrow has been defaulted on a parcel.

_____ 8. The system should provide for easy navigation between general real estate screens, contract screens and escrow screens without "losing" the respective parcel number, contract number and/or escrow account between screens.

_____ 9. The system should provide the ability to allow the cashier to apply a payment from an escrow account directly to the real estate charge when necessary, as opposed to treating it as an escrow payment. System should have the capability to apply escrow in full to the first half bill cycle. The system should allow for proration/escrow capability for Sheriff sales. Should also be able to remove NSF payments after the escrow process.

_____ 10. On an escrow account with multiple parcels, the system should provide the ability to remove/delete an individual parcel from the escrow account while allowing all others to remain.

_____ 11. The system should default an escrow account if payments were not made in full after each tax collection period/half.

_____ 12. When posting contract payments, the system must distinguish the contract payment from the respective half year charge.

7.17 Application Requirements – Computer Assisted Mass Appraisal (CAMA)

Parcel Maintenance and General Requirements

_____ 1. The system must have the functionality to delineate and maintain an unlimited number of neighborhoods.

_____ 2. The system must allow the user to copy or move land data, building improvement data and sketch data from one parcel to another or to another card of the same parcel.

_____ 3. The system must be capable of maintaining both legal deeded acreage and calculated acreage.

_____ 4. The system must be able to support a parcel being partially taxable and partially exempt so that multiple parcels do not have to be generated.

_____ 5. The system must be able to provide for a parcel to have multiple property classifications so that multiple parcels do not have to be generated.

_____ 6. The system pricing methodology must be able to produce the exact market valuations currently maintained by the County (currently rounded to the nearest $10). Rounding to the nearest $100 should be available.

_____ 7. The system must have the capability to update values through neighborhood factoring/trending for all classes of property which can be stratified by land and building separately.

_____ 8. The system must be able to provide a property record card that can be produced at the user's desktop.

_____ 9. A property record card for public use should be able to be generated (without the cost ladder detail

_____ 10. Individual users should be able to print property record cards in batches by neighborhood, district, municipality, or by a manually entered list.

_____ 11. Successful vendor will re-create the county's costing tables to generate values within 5% or less of the current CAMA system as a starting point for the 2018 sexennial reappraisal.

_____ 12. All values current as of the rollover from current system to new system will be put in as override values.

_____ 13. All sketch and parcel data will be able to be uploaded to DDTI for dissemination on the county's real estate data internet site.

Land Valuation

_____ 1. The system must allow for the pricing of land by square foot, front foot, acreage and gross site value (unitized). Front Foot method will allow for fractional dimensions similar in style to deed descriptions to four decimal places.

_____ 2. The system must maintain land pricing rates on a neighborhood by neighborhood basis in separate pricing tables based upon land class/type/code (i.e. residential/acreage/homesite). This feature allows land to be revalued in mass by only changing the rates in the tables.

_____ 3. The system must be able to support multiple types of land on a single parcel and value each type based upon the method and rate for that land type and for that neighborhood.

_____ 4. The system must allow for the entry of land influence factors such as topography, shape, view, etc. and allow the user to input an adjustment percentage factor (+/- 100%).

_____ 5. The system must allow for manual overrides to the land pricing tables on a line-by-line basis.

_____ 6. The system must provide "depth factor" and "small acreage" tables to adjust for abnormal land sizes. The county's current tables will be matched.

_____ 7. It is preferred that the system provide an area in the land screens for unlimited notes.

Sales

_____ 1. The system must provide the ability to maintain a sales file to be used for comparable sales selection, sales ratio studies and multiple regression sales analysis.

_____ 2. The sales file must include the following data: parcel number, sale date, new owner, previous owner, sale price, validity code, market code, conveyance number and the number of parcels in sale. The system must be able to lock or retrieve the market valuation as of the date of the sale.

_____ 3. There should be up to twenty sale validity codes available with the availability to run reports based on validity codes.

_____ 4. Sales ratio reports will have the ability to stratify the sales by sale amount increments, dwelling age, grade, or living area by neighborhood, district, municipality, or county-wide.

Permits

_____ 1. The system must provide a building permit file to be used for tracking the status of all permits issued throughout the County. The available fields that the user must be able to maintain include, but are not necessarily limited to, the permit date, permit number, estimated value of permit construction, purpose/nature of improvement and status of permit (open, closed, on hold, recheck, field appraiser ID, etc.). A note section is also helpful.

_____ 2. Permits should print on the property record card. A report should be able to be run on permits to show status (open or closed).

Residential Building Improvements

_____ 1. The system must provide the ability to maintain multiple building improvement cards for a single parcel.

_____ 2. The system must provide, but not necessarily limited to, the following data fields for building improvements:

Year Built
Effective Year
Story Height
Construction Type
Style
Total Rooms
Bedrooms
Family Rooms
Full Baths
Half-Baths
Additional Plumbing Fixtures
Basement Type
Heating Type
Heating Fuel Type
Attic Finish
Masonry Trim (dimensions or area)
Unfinished Areas (dimensions or area)
Recreation Room (dimensions or area)
Finished Basement Living Area (dimensions or area)
Wood Burning Fireplace Stacks
Wood Burning Fireplace Openings
Pre-Fabricated Fireplaces
Basement Garage - # of cars
Foundation Type
Grade
CDU (Condition, Desirability and Utility)

Cost and Design Factor
Percentage Complete
Percentage Exempted
Functional Depreciation
Economic Depreciation
Notes

_____ 3. The system must allow for pricing of basements and attics based upon their size and finished status.

_____ 4. The system will provide for the costing of crawl spaces and slabs

_____ 5. The system must allow for unfinished areas on any floor and adjust the pricing accordingly.

_____ 6. The system must provide building depreciation tables to be utilized in conjunction with calculating the building improvement costs. Effective age will be available to adjust depreciation on older homes that exhibit an effective age newer than the actual.

_____ 7. The system must provide for the cost and the comparable sales approaches to value.

_____ 8. The system must calculate a "Total Square Foot Living Area"

_____ 9. It is preferred that finished basement living area be calculated independent of the total SFLA and not included in the total SFLA.

_____ 10. The system must provide the ability to record, maintain and price a wide variety of other buildings and yard items (outbuildings) for every parcel. All current outbuilding types should be carried forward.

_____ 11. The system must display improvement cost ladders, whether residential or commercial, on the user's workstation.

Commercial/Industrial Building Improvements

_____ 1. The system must provide the ability to maintain multiple building improvement cards for a single parcel.

_____ 2. The system must provide the ability to maintain detail information on a commercial or industrial building improvement for each card by including, but not limited to, the following characteristics:

Year Built
Effective Year
Structure Code
Grade
Use Type and Group
Wall Height

Exterior Wall Type
Construction Type
Stories
Heating/Air Type
Plumbing Type
Sprinkler System
Loading Docks
Mezzanines and Enclosures
Parking – (Covered/Uncovered)
Elevators
Physical/Functional Condition Codes
Percentage Rented
Length, Width, Perimeter & Total Area by Section
Cost and Design Factor
Percentage Complete
Percentage Exempted
Economic Obsolescence
Functional Obsolescence
Tenant Roster/Occupant
Notes

_____ 3. The system must allow for unfinished areas on any floor and adjust the pricing accordingly.

_____ 4. The system must provide building depreciation tables to be utilized in conjunction with calculating the building improvement costs.

_____ 5. The system must provide for the cost, income and the comparable sales approaches to value. The income approach must be able to be applied for each use/occupancy area of the parcel and not just the entire parcel.

_____ 6. The system must provide the ability to enter income/expense information for the system to develop income models. In the event that operating statement data is not available, the system must allow the user to enter in gross or net income manually or calculate estimated income based upon use, size, condition, location and quality ratings.

_____ 7. The system must support the Marshall & Swift commercial and industrial costing methodologies.

_____ 8. The system must provide apartment rental characteristics such as number of units, bedrooms, baths, furnished/unfurnished, rent, income, etc.

_____ 9. The system must provide the ability to record, maintain and price a wide variety of other buildings and yard items (outbuildings) for every parcel.

_____ 10. The system should allow for the recording of building occupants (tenant roster)

_____ 11. All of the County's current outbuilding and building attributes will be matched in a

new system.

_____ 12. The system should be able to use residential costing for residential type improvements that may be located on a commercial/industrial/exempt parcel.

_____ 13. The system must display improvement cost ladders on the user's workstation.

Sketching

_____ 1. The sketch module must allow for user control over the location and size of sketch annotations such as dimensions, labels and square feet.

_____ 2. The sketch module must support multiple scales.

_____ 3. The sketch module must allow the user to be able to change the scale without reentering the vectors.

_____ 4. The sketch module must support drawing angles.

_____ 5. The sketch module must support drawing compound arcs.

_____ 6. The sketch module must provide for automatic closure of a sketch segment.

_____ 7. The sketch graphics and related tabular data of a parcel must be integrated so that when the sketch is changed the related tabular data is changed automatically to reflect the change in the sketch.

_____ 8. The sketch module must support the rotating of the sketch.

_____ 9. The sketch module must support flipping (mirror image) the sketch.

_____ 10. The sketch module must support an unlimited number of sketch notes.

_____ 11. The sketch module must allow the user to either sketch or "spot" outbuildings according to the user's preference on each parcel.

_____ 12. The sketch module should be able to support sketch segments without vectors for those segments that may be determined to be unsketchable.

_____ 13. The sketch module should be able to have a note inserted on the sketch to provide additional information. (Example: "built in 1990", "manufacturing" etc.)

The County reserves the right to select any, all or none of these applications from the Vendor chosen.

SECTION 8 – RESPONSE COST SUMMARY

NAME OF OFFEROR: _____

DETAIL OF TOTAL PROPOSAL AMOUNT FROM FORM OF COVER PAGE:

OPTION #1 – ON-SITE CLIENT HOSTED INTEGRATED PROPERTY TAX ACCOUNTING AND CAMA SOFTWARE AND IMPLEMENTATION SERVICES

Core System (Either list one price for total system or list module pricing separately)

Core system _____	$_____
Module (specify) _____	$_____
Module (specify) _____	$_____
Module (specify) _____	$_____
Module (specify) _____	$_____
Module (specify) _____	$_____
Module (specify) _____	$_____

Licensing Costs $_____

Current Year Data Conversion Costs $_____

Prior Years Data Conversion Costs $_____

Hardware / Software Installation Costs $_____

Training Costs $_____

Software Annual Maintenance Costs

First Year	$_____
Second Year	$_____
Third Year	$_____
Fourth Year	$_____
Fifth Year	$_____

Other Costs

$_____
$_____
$_____

TOTAL NOT TO EXCEED FIXED PRICE
(Must agree to "Total Not to Exceed Fixed Price" on FORM OF COVER PAGE) $_____

NOTE: Any additional detail or comments to these forms may be provided below and/or on subsequent pages by prospective vendors.

SECTION 8 – RESPONSE COST SUMMARY

(CONTINUED)

NAME OF OFFEROR: _____

DETAIL OF TOTAL PROPOSAL AMOUNT FROM FORM OF COVER PAGE:

OPTION #2 –WEB-HOSTED INTEGRATED TAX ACCOUNTING AND CAMA SOFTWARE, AND IMPLEMENTATION SERVICES

Core System (Either list one price for total system or list module pricing separately)

Core system	_____	$_____
Module (specify)	_____	$_____
Module (specify)	_____	$_____
Module (specify)	_____	$_____
Module (specify)	_____	$_____
Module (specify)	_____	$_____
Module (specify)	_____	$_____

Licensing Costs $_____

Current Year Data Conversion Costs $_____

Prior Years Data Conversion Costs $_____

Hardware / Software Installation Costs $_____

Training Costs $_____

Software Annual Maintenance Costs

First Year	$_____
Second Year	$_____
Third Year	$_____
Fourth Year	$_____
Fifth Year	$_____

Other Costs $_____
$_____
$_____

TOTAL NOT TO EXCEED FIXED PRICE
(Must agree to "Total Not to Exceed Fixed Price" on FORM OF COVER PAGE) $_____

NOTE: Any additional detail or comments to these forms may be provided below and/or on subsequent pages by prospective vendors.

Attachment 1

FORM OF COVER PAGE OF OFFEROR'S PROPOSAL

TOTAL NOT TO EXCEED FIXED PRICE: **OPTION #1** $ _____

TOTAL NOT TO EXCEED FIXED PRICE: **OPTION #2** $ _____

The undersigned Offeror, _____, having carefully inspected the instructions to offerors as
(Name of Firm)
provided in the Lake County, Ohio Request for Proposals for an Integrated Property Tax Accounting and Computer Assisted Mass Appraisal (CAMA) Software and Implementation Services, and having registered at and attended the mandatory vendors' conference, does hereby provide to Lake County, Ohio the following proposal, at an amount not to exceed the price as indicated, and in accordance with the instructions as contained in the Lake County, Ohio Request for Proposals for an Integrated Property Tax Accounting and Computer Assisted Mass Appraisal (CAMA) Software and Implementation Services .

The following documents are included with this proposal:

(1) The full name of every person or company interested in the proposal;

(2) A bond in the amount of 5% of the total proposal made payable to the Lake County Board of Commissioners;

(3) A properly executed delinquent property taxes affidavit;

(4) A properly executed non-collusion affidavit;

(5) A properly executed campaign contributions affidavit;

(6) A properly executed "Buy Ohio" disclosure statement;

(7) A fully completed County-prescribed Vendor Qualification Form;

(8) A properly executed "Declaration Regarding Material Assistance/No Assistance To a Terrorist Organization affidavit; and

(9) Three (3) copies of the offeror's proposal.

_____	_____
Signature	Company
_____	_____
Name	Address
_____	_____
Title	Address
_____	_____
Date	City, State, Zip

Attachment 2

AFFIDAVIT IN COMPLIANCE WITH SECTION 5719.042 OF THE OHIO REVISED CODE

STATE OF _____

COUNTY OF _____ } SS:

Personally appeared before me the undersigned, an offeror of a competitive sealed proposal for _____ (Name of Firm), for a _____ (Type of Product or Service) contract to be let by Lake County, Ohio,

who, being duly cautioned and sworn makes the following statement with respect to the personal property taxes on the general tax list of personal property of Lake County, Ohio:

1. That the undersigned at the time of making this bid on the aforementioned contract was not charged with any delinquent personal property taxes on the general tax list of personal property of Lake County.
2. That this statement is made in compliance with Section 5719.042 to be incorporated into the contract between the parties as provided in that section of the Ohio Revised Code.

_____
Signature

_____
Title

Subscribed and sworn before me this _____ day of _____, 2014.

_____
Notary Public

My commission expires

_____

Attachment 3

BUY OHIO DISCLOSURE STATEMENT

PLEASE COMPLETE THE FOLLOWING FORM AND SUBMIT IT WITH EACH COPY OF YOUR PROPOSAL.

1. Do you have facilities within Ohio? _____YES _____NO

   _____MANUFACTURING _____SALES OFFICE NUMBER OF OHIO EMPLOYEES_____

2. Are products offered in this proposal manufactured in Ohio? _____YES _____NO

   If no, state place of manufacture: _____

   _____

3. Are you registered with the Ohio Secretary of State? _____YES _____NO

   (If unsure of registration, call (614) 466-3910 for confirmation and charter number.)

   Charter Number: _____

4. Vendor hereby certifies that each end product, except the end product(s) listed below, is a domestic source and product as defined in the "Buy America Act"; and that components of unknown origin have been considered to have been mined, produced, or manufactured outside the United States.

   _____YES _____NO

   EXCEPTION(s): _____

   _____

   _____

_____
(Signature of Authorized Officer)

_____
(Signature of Authorized Legal Representative)

Attachment 4

NON-COLLUSION AFFIDAVIT

STATE OF _____ }
COUNTY OF _____ } SS:

_____, being first duly sworn, deposes and says that:
(Name)

1. He/she is _____ of _____, the Offeror that has submitted the attached
(Owner, Partner, Officer, Representative, Agent) *(Name of Firm)*
Proposal;

2. He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;

3. Such Proposal is genuine and is not a collusive or sham Proposal;

4. Neither the said Offeror nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this Affidavit, has in any way colluded, conspired, connived, or agreed, directly or indirectly with any other Offeror, firm, or person to submit a collusive or sham Proposal in connection with the Contract for which the attached Proposal has been submitted, or to refrain from making a proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement, collusion, communication, or conference with any other Offeror, firm, or person to fix the price or prices in the attached Proposal, or of any other Offeror, or to fix any overhead, profit, or cost element of the Proposal price or Proposal price of any other Offeror, or to secure through collusion, conspiracy, connivance, or unlawful agreement any advantage against the Board of County Commissioners of Lake County, Ohio or any person interested in the proposed Contract; and

5. The price or prices quoted in the attached Proposal are fair and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Offeror or any of its agents, representatives, owners, employees, or parties in interest, including this Affidavit.

_____
Signature

_____
Title

Subscribed and sworn before me this _____day of_____, 2014.

_____
Notary Public

My commission expires

_____

Attachment 5

AFFIDAVIT IN COMPLIANCE WITH SECTION 3517.13 OF THE OHIO REVISED CODE

STATE OF _____ }
COUNTY OF _____ } SS:

Personally appeared before me the undersigned, an offeror in a competitive sealed proposal for _____, for a _____contract to be let by Lake County, Ohio

(Name of Firm) *(Type of Product or Service)*

who, being duly cautioned and sworn, makes the following statement with respect to prohibited activities constituting a conflict of interest under O.R.C. Section 3517.13:

1. That no person or persons, whom are owners of at least twenty percent of the above named business or corporation nor any spouse of such person, has made, as an individual, within the two previous calendar years, one or more contributions totaling in excess of one thousand dollars to a candidate for or the holder of a public office having ultimate responsibility for the award of this contract, or to his/her campaign committee, nor have they aggregately given contributions totaling more than one thousand dollars.

2. That no person or persons employed by the above named firm, nor are their spouses in violation of any provision of Ohio Revised Code Section 3517.13.

_____
Signature

_____
Title

Subscribed and sworn before me this _____ day of _____, 2014.

_____
Notary Public

My commission expires _____

Attachment 6

CERTIFICATE AS TO CORPORATE PRINCIPAL

I, _____, certify that I am the Secretary of the corporation named as Principal in the within bond; that _____, who signed the said bond on behalf of the Principal was then _____ of said corporation; that I know this signature, and his signature thereto is genuine, and that said bond was duly signed, sealed and attested to for and in behalf of said corporation by authority of its governing body.

_____

Corporate

_____

Seal

Title

Attachment 7

CIVIL RIGHTS COMPLIANCE CERTIFICATE

Vendor agrees that in the performance of the agreement to provide a property tax accounting software system and/or a computer assisted mass appraisal software system and implementation services for Lake County, Ohio, there shall be no discrimination against an employee because of race, color, sex, religion, national origin, or any other factor as specified in the Civil Rights Act of 1964 and subsequent amendments.

_____

Name of Company

_____

Signature of Representative of Vendor

_____

Date

Attachment 8

VENDOR QUALIFICATIONS

The County intends to evaluate each offeror's qualifications as part of the overall evaluation process. As a result, please provide the following information:

COMPANY NAME _____

PARENT COMPANY NAME (if applicable) _____

YEARS IN BUSINESS _____

NUMBER OF EMPLOYEES:

Administration	_____
Marketing	_____
Software Support	_____
Software Development	_____
Installation/Training	_____
Other	_____

INTEGRATED PROPERTY TAX ACCOUNTING WITH CAMA SOFTWARE (CLIENT-HOSTED) INSTALLATIONS SIMILAR TO ONE BEING PROPOSED:

Total number of Ohio County installations	_____
Total number of County installations outside of Ohio	_____
Total number of Other Ohio Government installations	_____

INTEGRATED PROPERTY TAX ACCOUNTING WITH CAMA SOFTWARE (WEB-HOSTED) INSTALLATIONS SIMILAR TO ONE BEING PROPOSED:

Total number of Ohio County installations	_____
Total number of County installations outside of Ohio	_____
Total number of Other Ohio Government installations	_____

Please provide list of all current Ohio clients.

COMPANY AWARDS / CERTIFICATIONS:

_____

_____

_____

The County seeks a meaningful, substantive and long-term relationship with the selected software provider and realizes that a vital resource will be the vendor's staff members. Please provide biographies of key staff members, including the company's president, financial division managers and any staff members who will be involved in the Lake County project. Include key facts about each person, such as length of employment with the vendor, job responsibilities, certifications held and past experience with Ohio governments. In addition, please provide the most recent audited financial statements of the company.

Attachment 9

DECLARATION REGARDING MATERIAL ASSISTANCE / NO ASSISTANCE TO A TERRORIST ORGANIZATION

Please download the form from the following website, complete the form and submit it in your proposal response as Attachment 9:

http://www.homelandsecurity.ohio.gov/DMA_Terrorist/HLS_0038_Contracts.pdf

Commissioners' Office, Lake County

Painesville, OH, June 4, 2013

The Board of County Commissioners, in and for Lake County, Ohio, met this day in regular session with the following members present:

Commissioners: *(com)

* presented the following resolution and moved its adoption.

RESOLUTION AUTHORIZING ADVERTISING FOR PROPOSALS FOR A MOBILE COMMAND CENTER FOR THE LAKE COUNTY EMERGENCY MANAGEMENT AGENCY (OPENING: JUNE 26, 2013)

WHEREAS, the Board of County Commissioners hereby finds and determines that all formal actions relative to the adoption of this resolution were taken in an open meeting of this Board of County Commissioners, and that all the deliberations of this Board of County Commissioners and of its committees, if any, which resulted in formal actions, were taken in meetings open to the public, in full compliance with applicable legal requirements, including Section 121.22 of the Revised Code, and

WHEREAS, by resolution #20121114\C02 dated November 14, 2012, the Board of Lake County Commissioners, as sub-grantee, accepted a FY2012 State Homeland Security Program Grant and authorized execution of Sub-Grantee Grant Agreement #42256 for a Mobile Command Center as part of the Specialized Core Capabilities-Moved to Gap from Sustainment Project; and

WHEREAS, the Board of Lake County Commissioners has authorized the Lake County Emergency Management Agency (LCEMA) to administer the grant; and

WHEREAS, the LCEMA has requested that the Board of Lake County Commissioners advertise for proposals for the purchase of a mobile command center according to the provided specifications and criteria; and

WHEREAS, the Board of County Commissioners determines, pursuant to Section 307.86 of the Revised Code that it is advantageous to Lake County to use competitive sealed proposals pursuant to the procedures outlined in Section 307.862 of the Revised Code.

NOW, THEREFORE, BE IT RESOLVED, that the Board of County Commissioners, in and for Lake County, Ohio, as sub-grantee of FY2012 State Homeland Security Program Grant, hereby instructs the Clerk of the Board to advertise for proposals for the purchase of a mobile command center. Such advertisement shall appear two (2) weeks prior to the date fixed for receiving proposals in a newspaper of general circulation in the County as required by law, on the Lake County Website, on the Lake County Administration Building Bulletin Board, and on the State of Ohio website.

BE IT FURTHER RESOLVED, that the Clerk of the Board is hereby directed to forward certified copies of this resolution to the Lake County Auditor, Budget Director; Lake County Emergency Management Agency; and the Lake County Prosecuting Attorney.

** seconded the resolution and the roll being called upon its adoption, the vote resulted as follows:

"AYES": Commissioners: *(com)

"NAYS": None

Resolution adopted,

Amy Elszasz, Clerk

CLERK'S CERTIFICATION

I, Amy Elszasz, duly appointed Clerk of the Board of County Commissioners, do hereby certify that this is a true and accurate copy of a resolution adopted by said Board on June 4, 2013 and recorded in the Commissioners' Journal, Volume 2012.

WITNESS my hand this fourth day of June, 2013, in Painesville, Ohio.

_____

Amy Elszasz, Clerk

Board of Commissioners, in and

for Lake County, Ohio

LEGAL NOTICE REQUIRED

PUBLISH: NEWS HERALD|Friday, June 7, 2013

posted on the Lake County Website

posted on the State of Ohio website

posted on Lake County Administration Bulletin Board

OPEN: JUNE 26, 2013

S:\LCC\CLK\RESOLUTIONS\2013-RES\20130604\C01.doc

LEGAL NOTICE FOR PROPOSALS

Sealed Proposals will be received by the Board of Lake County Commissioners in and for Lake County at their Office in the Lake County Administration Center, 105 Main Street, Painesville, Ohio 44077; up to the hour of 11:00 AM local time on the 26th, day of June, 2013 and will remain sealed until the award of the contract is made pursuant to Section 307.862 of the Revised Code to provide a vehicle capable of serving the needs of the Lake County public safety forces.

The proposal package and a description of specifications for the Mobile Command Center can be obtained in the Office of the Board of Lake County Commissioners, 105 Main Street Painesville, Ohio 44077, during weekday business hours from 8:00 a.m. to 4:30 p.m.

Proposals shall be addressed to the Board of Lake County Commissioners, 105 Main Street Painesville, Ohio 44077 and marked SEALED PROPOSAL FOR MOBILE COMMAND CENTER.

Questions can be directed to Director Larry Greene, Lake County Emergency Management Agency, 8505 Garfield Road, Mentor, OH 44060 (440) 350-5499.

The Proposal deemed most advantageous to Lake County will be awarded the contract to provide the Mobile Command Center. The Board reserves the right to reject any and all proposals. Each proposal must contain the full legal name of the person bidding and the principal owners if operating as a legal entity with a different name.

Pursuant to R.C. 153.01 et. seq. the original sealed Proposal must be accompanied by a bond, certified check, cashier's check, or money order in the amount of five percent of the full proposal amount, payable to the Board of Lake County Commissioners. The bond, certified check, cashier's check, cashier's check, or money order is subject to forfeiture if the bid is awarded and the contract is not entered into. The proposals must be held open for a period not longer than sixty (60) days after opening and the award may take place at any time after opening within the sixty (60) day period.

No Offeror shall be considered eligible to be awarded the contract to which this Notice or Specifications apply, if the Offeror is listed on the Auditor of State's Database as having a "Finding of Recovery" as that term is defined in R.C. 9.24.

Persons submitting proposals may also access this Legal Notice for Request for Proposals and the proposal package via the internet at www.lakecountyohio.gov. Click on Legal Notices to Bidders, or on the State of Ohio Web Site at www.publicnotice.ohio.gov

BY ORDER OF the Board of Lake County Commissioners in and for Lake County, Ohio

Robert E. Aufuldish, President

Judy Moran

Daniel P. Troy

Amy Elszasz, Clerk

PUBLISH: THE NEWS HERALD: June 7, 2013

Lake County Website and Bulletin Board

State of Ohio Website

Lake County, Ohio

EDWARD H. ZUPANCIC
COUNTY AUDITOR

SECRETARY OF
BUDGET COMMISSION
BOARD OF REVISION

ADMINISTRATOR
DATA PROCESSING DEPT.

LAKE COUNTY ADMINISTRATION CENTER
105 MAIN ST.
P. O. BOX 490
PAINESVILLE, OHIO 44077-0490

440-350-2532
440-428-4348
440-918-2532
440-918-2500
FAX: 440-350-2667

September 25, 2014

Correction to the Request for Proposals Issued by
the Lake County Board of Commissioners
for Property Tax Accounting Software,
Computer Assisted Mass Appraisal (CAMA) Software,
and Implementation Services

Attachment 9

Due to the fact that Ohio Revised Code Section 2909.33 has been repealed, Attachment 9 (Declaration Regarding Material Assistance/No Assistance To a Terrorist Organization) is no longer required to be submitted as part of a proposal in response to the RFP. Any reference to this document elsewhere in the RFP shall be considered stricken.