

**PROPOSALS MUST BE SEALED AND ADDRESSED TO:**

**AGENCY ADDRESS:**

Department of Revenue  
Linda M. Balsiger  
2135 Rimrock Road, MS #6-261  
P.O. Box 8931  
Madison WI 53708-8931

**REQUEST FOR PROPOSAL**

THIS IS NOT AN ORDER

PROPOSER (Name and Address)

Remove from proposer list for this commodity/service. (Return this page only.)

Proposal envelope must be sealed and plainly marked in lower corner with due date and Request for Proposal # **RELB-026**. Late proposals will be rejected. Proposals MUST be date and time stamped by the soliciting purchasing office on or before the date and time that the proposal is due. Proposals dated and time stamped in another office will be rejected. Receipt of a proposal by the mail system does not constitute receipt of a proposal by the purchasing office. Any proposal which is inadvertently opened as a result of not being properly and clearly marked is subject to rejection. Proposals must be submitted separately, i.e., not included with sample packages or other proposals. Proposal openings are public unless otherwise specified. Records will be available for public inspection after issuance of the notice of intent to award or the award of the contract. Proposer should contact person named below for an appointment to view the proposal record. Proposals shall be firm for acceptance for sixty (60) days from date of proposal opening, unless otherwise noted. The attached terms and conditions apply to any subsequent award.

Proposals MUST be in this office no later than

**July 18, 2005, 2:30 p.m. local time**

No Public Opening  X

Name (Contact for further information)

Linda Balsiger

Phone

(608) 266-3396

Date

May 18, 2005

Quote Price and Delivery FOB

Installed

Description

THE WISCONSIN DEPARTMENT OF REVENUE REQUESTS PROPOSALS FOR AN INTEGRATED PROPERTY ASSESSMENT SYSTEM (IPAS) FOR THE DIVISION OF STATE AND LOCAL FINANCE (SLF).

Payment Terms:

Delivery Time:

We claim minority bidder preference [Wis. Stats. s. 16.75(3m)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Minority Business Enterprises. Bidder must be certified by the Wisconsin Department of Commerce. If you have questions concerning the certification process, contact the Wisconsin Department of Commerce, 5th Floor, 201 W. Washington Ave., Madison, Wisconsin 53702, (608) 267-9550.

We are a work center certified under Wis. Stats. s. 16.752 employing persons with severe disabilities. Questions concerning the certification process should be addressed to the Work Center Program, State Bureau of Procurement, 6th Floor, 101 E. Wilson St., Madison, Wisconsin 53702, (608) 266-2605.

Wis. Stats. s. 16.754 directs the state to purchase materials which are manufactured to the greatest extent in the United States when all other factors are substantially equal. Materials covered in our bid were manufactured in whole or in substantial part within the United States, or the majority of the component parts thereof were manufactured in whole or in substantial part in the United States.

Yes  No  Unknown

In signing this proposal we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

We will comply with all terms, conditions and specifications required by the state in this Request for Proposal and all terms of our proposal.

Name of Authorized Company Representative (Type or Print)

Title

Phone ( )

Fax ( )

Signature of Above

Date

Federal Employer Identification No.

Social Security No. if Sole Proprietor (Voluntary)

**TABLE OF CONTENTS**

**PART I**

1.0 GENERAL INFORMATION ..... 4

2.0 PREPARING AND SUBMITTING A PROPOSAL ..... 12

3.0 PROPOSAL SELECTION AND AWARD PROCESS ..... 15

4.0 SPECIAL CONTRACT TERMS AND CONDITIONS ..... 17

5.0 COST PROPOSAL ..... 27

6.0 REQUIRED FORMS ..... 29

**PART II**

G.0 GENERAL REQUIREMENTS ..... 42

T.0 TECHNICAL REQUIREMENTS ..... 45

    0.0 Section 0 Overview ..... 45

    1.0 Section 1 General System Requirements ..... 46

    2.0 Section 2 Database Design ..... 52

    3.0 Section 3 Data Maintenance ..... 58

    4.0 Section 4 Query, Analysis & Reporting ..... 62

    5.0 Section 5 Land Valuation ..... 64

    6.0 Section 6 Cost Method of Valuation ..... 66

    7.0 Section 7 Comparable Sales Analysis and Valuation Processes ..... 69

    8.0 Section 8 Income Approach ..... 74

    9.0 Section 9 Valuation ..... 75

    10.0 Section 10 Sales and Ratio Studies ..... 77

    11.0 Section 11 System Administration ..... 79

    12.0 Section 12 System Support ..... 83

## ATTACHMENTS

- A. Standard Terms & Conditions and Supplemental Standard Terms & Conditions For Procurement of Services
- B. Non-disclosure Agreement
- C. 1. Wisconsin Property Tax Overview
- C. 2. SLF Systems Flowchart
- D. 1. Background Information for Future IPAS (Equalization, Real Estate Transfer Return (RETR) and Local Government Services (LGS))
- D. 2. e-RETR Schema
- D. 3. e-RETR project - WSDL
- D. 4. e-RETR Flow diagram
- E. WPAM – Volume I (a CD mailed on request - note: signed Proprietary Acknowledgement Agreement required by DOR prior to forwarding CD; form found in Part I, Section 6)
- F. WPAM – Volume II (a CD mailed on request - note: signed Proprietary Acknowledgement Agreement required prior to forwarding; form found in Part I, Section 6)
- G. Micro Cost Program (a CD mailed on request – note: signed Proprietary Acknowledgement Agreement required prior to forwarding; form found in Part I, Section 6)
- H. SLF Business Process Model (a paper copy in a binder, mailed on request - note: signed Proprietary Acknowledgement Agreement required prior to forwarding; form found in Part I, Section 6)
- I. SLF Data Model
- J. E-filing M-Forms Requirements
- K. IPAS RFP Dictionary (includes acronym dictionary)
- L. Wisconsin Assessment Roll Examples
- M. SAS DB2 Table Formats
- N. Manufacturing Fielded Sales DB2 Table Formats
- O. Market Data Selection Criteria
- P. Manufacturing Sketch Example
- Q. SLF Standard Reports
- R. Draft Manufacturing Property Record Card
- S. SAR-related Information
- T. Manufacturing PA-531
- U. SAS Use/Reject Criteria List
- V. SAM and SAR DB2 Table Formats
- W. LGS Information
- X. Assessment Notice Examples
- Y. DB2 Table Formats for TVCC
- Z. DB2 Table Formats for Tax Incremental Financing (TIF)

NOTE REGARDING ATTACHMENTS: The attachments mentioned above are voluminous (estimated 29 MB) and are not being distributed in paper form; nor are these attachments being posted on VendorNet. The attachments contain very important information that should be reviewed by proposers. Most attachments will be in zipped files available for viewing and downloading by going to the following page on the Department of Revenue website [www.dor.state.wi.us/slf/ipas.html](http://www.dor.state.wi.us/slf/ipas.html). Attachments E, F, G and H are only available to potential proposers who sign the Proprietary Acknowledgement Agreement (found in Section 6 - Required Forms) and submit as instructed on the form. Upon receipt of the signed agreement, the CD (Attachments E, F and G) and binder (Attachment H) will be sent to the vendor.

## 1.0 GENERAL INFORMATION

### 1.1 INTRODUCTION AND BACKGROUND

The purpose of this document is to provide interested parties with information needed to prepare and submit a proposal for an Integrated Property Assessment System (IPAS), as defined herein, that will meet the operational needs of the State and Local Finance Division (SLF) of the Wisconsin Department of Revenue (DOR). The State, as represented by its Department of Revenue, intends to use this process to award one Contract to single primary vendor for the sale, modification and installation of commercially-available software for use on the State's equipment. If the requirements of this Request for Proposal cannot be met by a single vendor, multiple vendors may work together and submit their proposal under one prime vendor. The prime vendor receiving the award for this Contract will be responsible for all sub-contractors/partners under this Contract.

Part I of the Request for Proposal (RFP) document details general information about the IPAS project, the RFP process itself, special contract terms and conditions and required forms. Part II provides the general and technical requirements. Attachments A through Z are voluminous (estimated 29 MB) and are not being distributed in paper form; nor are these attachments being posted on VendorNet. Vendors are responsible for accessing and viewing the attachments. The attachments contain very important information that should be reviewed by all potential proposers. Most attachments will be available for viewing and downloading by going to the Department of Revenue website [www.dor.state.wi.us/slf/ipas.html](http://www.dor.state.wi.us/slf/ipas.html). Some attachments may be in zipped files. Attachments E, F, G and H are only available to potential proposers who sign and submit the Proprietary Acknowledgement Agreement (found in Part I Section 6 - Required Forms) as instructed on the form. Upon receipt of the signed agreement, DOR will send the CD (Attachments E, F and G) and binder (Attachment H) to the vendor.

The DOR's SLF Division is responsible for the valuation and assessment of manufacturing and utility properties, determination of equalized values for all municipalities, establishment of uniform property assessment standards and practices, and administration of credits. See Attachment C.1. for an overview of Wisconsin Property Tax and SLF responsibilities.

### 1.2 SCOPE OF PROJECT

#### 1.2.1 Project description

The base product for the IPAS project must be a commercial off-the-shelf (COTS) product(s), and will be modified by the Contractor to perform required SLF functions. Various other COTS products may be added to the base product by the Contractor in order to perform IPAS functionality requirements. Project releases will create new efficient processes and an automated computer system that can replace the majority of existing SLF systems and processes.

Performance under a Contract awarded as a result of this RFP, may be reviewed and validated by a third party.

The following paragraphs provide information regarding IPAS required functionality and how that functionality will be implemented through six (6) releases, which comprise the first phase of the IPAS project. The projected delivery timeframe is discussed in PART 1 Section 1.2.4 Delivery and in the Projected IPAS Implementation Timeline found in PART II General RFP Requirements.

#### a. Functionality

- IPAS will include the following functionality:
- Multiple jurisdiction property valuation

- Assessment administration (notices, letters and reports)
- Data storage and retrieval e.g. parcel and sales databases
- Statistical analysis
- Query capabilities
- Data import and export
- Workflow e.g. appeals tracking, field review and audits
- Digital photos and sketches
- Geographic Information Systems (GIS)

b. Implementation

The functionality will be implemented as follows:

Release 1 – IPAS Base System includes:

- General system requirements
- Database design and maintenance
- Digital photos and sketches
- Query, analysis and reporting
- Data conversion

Release 2 – Sales database

Release 3 – Cost method of valuation

Release 4 – Valuation other than Cost includes:

- Land valuation
- Comparable sales analysis and valuation
- Sales ratio analysis
- Income approach
- Value reconciliation
- Compilation of values
- Telecommunications assessment and taxation (TELCO)

Release 5 – Geographic Information System

Release 6 – Field work, appeals and workflow

System administration and support is required with each release.

c. Summary of requirements

Appropriate documentation and training must be included in each release.

IPAS must be flexible, modular and consistent with modern software design. It must provide the ability to customize screen display and update business rules without source code changes. The database design must incorporate GIS, sketching and photo capabilities.

The Wisconsin Property Assessment Manual (WPAM) Volume I provides the standards and procedures for property assessment in Wisconsin. Volume II of the WPAM provides the standards and procedures for costing residential and agricultural improvements. The System proposed must incorporate the WPAM Volume II cost for residential and agricultural property and the Marshall & Swift Valuation Service cost standards and procedures for commercial and manufacturing property. The System must also be adaptable to changes in Wisconsin property assessment law.

The System must provide for secure access, including network address and specific use restrictions. The System must use layer security and distinguish between internal and external users operating over a Wide Area Network.

The System will exchange data with numerous stakeholders including 1,851 local units of government, 72 counties, other State and Federal agencies (DOA, DNR, DOT, US

Dept of Interior, US Dept of Agriculture) and customers, such as manufacturers. It must support export and import in at least ASCII, XML, Excel and Access formats.

Exchanged data will include items such as parcel land and improvement characteristics, attributes for 3.6 million real estate parcels and over 200,000 personal property accounts, assessment rolls, legal descriptions, assessment and sales values data, and property updates.

Ad hoc query tools such as Crystal Reports and Statistical Analysis Software (SAS) will be used to analyze and report on IPAS tables. Users must be able to query all IPAS databases by selecting tables and fields. Reports must provide summary tabulations and statistical calculations, such as totals, subtotals, record counts and basic summary statistics.

Additionally, the System must maintain a seamless link and extract capability for advanced statistical calculations. Statistical functions would include frequency distributions, medians, means, standard deviations, coefficients of dispersion and concentration measures.

The System must provide a modern and flexible process to analyze data and estimate real and personal property assessed and market values. The analysis process must include all three standard approaches to property valuation: cost, sales comparison and income. The System must provide a mechanism to consolidate parcel information and value indications generated from the cost, income, and sales comparison approaches with appropriate management review and value overrides.

The Real Estate Transfer Return (RETR) form is filed when real estate transfers occur. The RETR data is used for many purposes including sales and market analysis. Electronic filing of this form will begin in late 2005. SLF receives 250,000 RETRs annually and anticipates retaining eight (8) years of active sales data. The System must incorporate the electronic processing, analysis and archiving of this data.

The System must provide administrative functions including notification rolls, assessment notices, full value rolls, and equated rolls for each municipality in the State with manufacturing assessed property. Currently the State system has approximately 11,000 personal property accounts and 12,000 real property parcels. IPAS must provide all administrative functions for manufacturing and Telco property, computer exemption values, and must produce assessment rolls and assessment and penalty notices. IPAS must provide an electronic interface (one or a few common application programming interfaces (API)) with the 72 counties' and several municipalities' tax roll systems.

The System must provide an efficient method for dealing with taxpayer appeals; supporting tracking, scheduling all steps, providing notices and value changes in the appeal process. IPAS must also provide a worklist process. The process must maintain inspection scheduling and status information for each manufacturing real estate and personal property account, field review and sales fielding process.

The System should provide direct public access to various levels of information in a browser based format. Access to the background data should be available as a downloadable file.

All User (Business) Documentation must include appropriate reference guides and manuals on the System use and maintenance. The documentation should include references to forms, notices and reports underlying systems use, a comprehensive online help facility, and Quick Reference Guides by job functions.

The System should provide for data conversion as outlined in the technical specifications. Data conversion involves converting existing electronic information the State currently maintains into a Systems useable format.

DOR anticipates that there will be future functionality required which will be addressed in subsequent phases of the IPAS project, not covered under this RFP.

#### 1.2.2 Objectives

The following are IPAS objectives.

- a. Make data more accessible for stakeholders;
- b. Increase the efficiency of SLF work processes through process improvement, system and technology upgrades, and business process automation;
- c. Improve the accuracy and fairness of SLF outputs such as manufacturing and utility assessments and equalized values for the State.
- d. Improve SLF's ability to analyze and use data. SLF will be better able to meet statutory requirements.
- e. IPAS will be the central collection point to fully realize the benefits of improvement projects such as Real Estate Transfer Return e-filing and M-Form e-filing.

#### 1.2.3 Current operations

SLF has approximately forty (40) systems that are not fully integrated; many use older technology (such as IMS databases), and most have exceeded their life cycle. Current systems, work processes, and data structure are described throughout this RFP and specifically in the Business Process Model (Attachment H) and Data Model (Attachment I). Attachment C.2. depicts the connection of SLF's major computer systems.

#### 1.2.4 Delivery

The projected timeline for delivery of the six releases of the IPAS project covered by this RFP is shown in the following chart.

The successful proposer, hereafter referred to as "the Contractor", and DOR will work together to determine the project start date and finalize a schedule for the releases of IPAS.

DOR reserves the right to review its priorities and determine in its sole discretion whether or not to proceed with the implementation of the next release. In the event DOR decides that it will not implement the next release, Section 4.7, Termination herein, shall apply.

The warranty on all releases is 12 months from SLF acceptance of that release. See Section 4.33 herein.

<b>Projected 5-Year IPAS Project Plan (Phase 1)</b>					
Maintenance and support agreements are through December 31, 2009.					
Years:	2005	2006	2007	2008	2009
<b>Release 1</b>	Development & Implementation	Oct. 31	Apr. 30		
	Warranty		Apr. 30	Apr. 30	
	License & Maintenance		Apr. 30		Dec. 31
<b>Release 2</b>	Development & Implementation	Oct. 31	May 31		
	Warranty		May 31	May 31	
	License & Maintenance		May 31		Dec. 31
<b>Release 3</b>	Development & Implementation	Dec. 31	June 30		
	Warranty		June 30	June 30	
	License & Maintenance		June 30		Dec. 31
<b>Release 4</b>	Development & Implementation		Apr. 30	Oct. 31	
	Warranty		Oct. 31	Oct. 31	
	License & Maintenance		Oct. 31		Dec. 31
<b>Release 5</b>	Development & Implementation		Oct. 31	Jan. 31	
	Warranty		Jan. 31	Jan. 31	
	License & Maintenance		Jan. 31		Dec. 31
<b>Release 6</b>	Development & Implementation		Oct. 31	Mar. 31	
	Warranty		Mar. 31	Mar. 31	
	License & Maintenance		Mar. 31		Dec. 31

### 1.3 PROCURING AND CONTRACTING AGENCY

The Wisconsin Department of Revenue issues this Request for Proposal (RFP) for the SLF Division. DOR purchasing personnel will be the sole point of contact for the State of Wisconsin during the selection process. The person responsible for managing the procurement process is Linda Balsiger.

Jean Gerstner will administer the Contract.

### 1.4 DEFINITIONS

The following definitions are used throughout the RFP.

**Agency** - means the Wisconsin Department of Revenue (DOR).

**Base COTS Product** – Existing, commercial off-the-shelf software suitable for general use, supplied by the Contractor throughout the duration of the Contract for modification and implementation to meet the requirements of this RFP for each of the releases of IPAS.

**Contract** - includes and incorporates the specifications, terms and conditions of this RFP and any amendments thereto; the proposal submitted by the successful vendor and any amendments thereto and any modifications, or terms, or conditions agreed to by both parties.

**Contractor** - means proposer awarded the Contract.

**Modified COTS Product** – Base COTS Product that has been modified by the Contractor to meet the requirements of this RFP. The modified COTS Product is also referred to herein as the Licensed Software.

**IPAS or System** – means Integrated Property Assessment System and consists of the following components:

1. The Modified COTS Product;
2. Processes and procedures developed by the Contractor for DOR to use in the implementation and operation of the Modified COTS Product;
3. Documentation supplied by the Contractor for components 1 and 2 above; and,
4. DOR Software that will work with the Modified COTS Product.

**Proposer/vendor** - means a firm submitting a proposal in response to this RFP.

**SLF** - Division of State and Local Finance.

**State** - means State of Wisconsin.

Also see Attachment K Wisconsin IPAS RFP Dictionary for additional definitions and acronyms.

### 1.5 CLARIFICATION OF THE SPECIFICATIONS

Any questions concerning this RFP must be submitted in writing and entitled "Vendor's Questions" on or before noon June 6, 2005 to:

Linda Balsiger  
 Wisconsin Department of Revenue  
 2135 Rimrock Road, MS 6-261  
 PO Box 8931

Madison, WI 53708-8931  
(608) 266-3396 (Phone Number)  
(608) 280-3565 (Fax Number)  
[lbalsige@dor.state.wi.us](mailto:lbalsige@dor.state.wi.us)

Email is the preferred method for submission of questions.

Vendors are expected to raise any questions, exceptions, or additions they have concerning the RFP document. If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the vendor should immediately notify the above named individual of such error and request modification or clarification of the RFP.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all vendors submitting a Notice of Intent to Submit a Proposal or who request this information, and will be posted on VendorNet.

Each proposal shall stipulate that it is predicated upon the requirements, terms, and conditions of this RFP and any supplements or revisions thereof.

Any contact with State employees concerning this RFP is prohibited, except as authorized by the RFP manager during the period from date of release of the RFP, until the notice of intent to contract is released.

#### 1.6 NOTICE OF INTENT TO SUBMIT PROPOSAL

Prospective proposers are requested but not required to submit a Notice of Intent to Submit Proposal (See Part I Section 6, Required Forms).

Any supplemental written information or amendments related to the RFP will be automatically provided to those prospective proposers who have filed a Notice of Intent to Submit Proposal or to those who request such information and will be posted to VendorNet.

Notices should be faxed or e-mailed by noon on June 6, 2005 to the following address:

Linda Balsiger, Purchasing Office  
Wisconsin Department of Revenue  
FAX: (608) 280-3565  
[lbalsige@dor.state.wi.us](mailto:lbalsige@dor.state.wi.us)

#### 1.7 VENDOR CONFERENCE

A vendor conference will be held on Monday June 13, 2005 at 9:00 a.m. in the Revenue Building Events Room located on first floor at 2135 Rimrock Road, Madison, Wisconsin. If no questions are received, the State reserves the right to cancel the vendor conference. All vendors who intend to respond to the RFP should attend the vendor conference.

The purpose of the conference will be to permit DOR to respond to written questions received from vendors to clarify, if necessary, the specifications and requirements of the RFP, to provide prospective vendors an opportunity to ask additional questions regarding the RFP and to provide any needed additional instruction on the submission of proposals. Statements made by DOR personnel at the conference shall not modify or qualify any provision of the RFP. Any modifications or changes to specifications will be addressed through the RFP amendment process.

DOR will not provide a transcript of the conference. However, written responses to the submitted questions will be posted to VendorNet and sent to those who submit a Notice of Intent to Submit a Proposal and sent to those that request them.

#### 1.8 REASONABLE ACCOMMODATIONS

The Department will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations at the vendor conference, contact Linda Balsiger at (608) 266-3396 (voice) or (800) 947-3529 (TTY).

#### 1.9 CALENDAR OF EVENTS

Listed below are specific dates and times of actions related to this RFP. The actions with specific dates must be completed as indicated unless otherwise changed by the State. In the event that the State finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing an amendment to this RFP. There may or may not be a formal notification issued for changes in the estimated dates and times.

<u>DATE</u>	<u>EVENT</u>
05/18/05	Date of issue of the RFP.
06/06/05 Noon	Submit Notice of Intent to Propose.
06/06/05 Noon	Last day for submitting written inquires.
06/13/05 9:00 a.m.	Vendor conference.
06/17/05 (est.)	Respond to written inquiries.
07/18/05 2:30 p.m.	Proposals due from vendors.
08/29/05 (est.)	Oral presentations/Demonstrations by invited vendors, if needed.
09/6/05 (est.)	Site visits for invited vendors, if needed.
09/12-26/05 (est.)	Notification of intent to award sent to vendors.

#### 1.10 CONTRACT TERM

The Contract shall be effective on the date indicated in the Contract or the Contract execution date and shall run for 3 years from that date with the option of up to two (2) additional one-year extensions.

#### 1.11 VENDORNET REGISTRATION

The State of Wisconsin's purchasing information and vendor notification service is available to all businesses and organizations that want to sell to the State. Anyone may access VendorNet on the Internet at [www.vendornet.state.wi.us](http://www.vendornet.state.wi.us) to get information on state purchasing practices and policies, goods and services that the State buys, and tips on selling to the State. Vendors may use the same Web site address for inclusion on the bidder list for goods and services that the organization wants to sell to the State. A subscription with notification guarantees the organization will receive an e-mail message each time a State agency, including any campus of the University of Wisconsin System, posts a request for bid or a request for proposal in their designated commodity / service area(s) with an estimated value over \$25,000. Organizations without Internet access receive paper copies in the mail. Increasingly, State agencies also are using VendorNet to post simplified bids valued at \$25,000 or less. Vendors also may receive e-mail notices of these simplified bid opportunities. There is no annual fee for this service.

In the future, requests for bids from the Wisconsin Department of Revenue will be sent automatically only to vendors subscribing to VendorNet. If questions exist about VendorNet, call the VendorNet Information Center at 1-800-482-7813 or, for Madison area organizations call 264-7898.

*To obtain information on the State's registration process, please visit the VendorNet Web site at [www.vendornet.state.wi.us](http://www.vendornet.state.wi.us) or call the VendorNet Information Center (1-800-482-7813). In the Madison area, please call 264-7897 or 264-7898.*

## 2.0 PREPARING AND SUBMITTING A PROPOSAL

### 2.1 GENERAL INSTRUCTIONS

The evaluation and selection of a Contractor and the Contract will be based on the information submitted in the vendor's proposal plus references and any required on-site visits or oral presentations or demonstrations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g. expensive artwork) beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

### 2.2 VENDOR INFORMATION FORM

Proposers must complete the Vendor Information Form located in Part I Section 6. Indicate the names and phone numbers for contact persons as requested.

### 2.3 VENDOR REFERENCE FORM

Proposers are required to complete the Vendor Reference Form located in Part I Section 6. Proposers must provide the names of five (5) clients to whom similar products and services have been provided within the last five (5) years. For each client, include the company name, address, contact person, title of contact person, project role and telephone number along with a brief description of the product and services. DOR will determine which, if any, references to contact. If subcontractors are proposed, the subcontractor should also complete a Vendor Reference Form.

### 2.4 INCURRING COSTS

The State of Wisconsin is not liable for any cost incurred by proposers in replying to this RFP.

### 2.5 SUBMITTING THE PROPOSAL

Proposers must submit one (1) original (clearly identified as ORIGINAL) and eight (8) copies (clearly identified as Copy 1, Copy 2 etc.) of all materials required for acceptance of their proposal by July 18, 2005 2:30 p.m. local time to:

US MAIL DELIVERY:  
Linda Balsiger, Purchasing Agent  
Wisconsin Department of Revenue  
Purchasing Office, MS 6-261  
P.O. Box 8931  
Madison, WI 53708-8931

DELIVERY SERVICE  
Linda Balsiger, Purchasing Agent  
Wisconsin Department of Revenue  
Purchasing Office, MS 6-261  
2135 Rimrock Road  
Madison, WI 53713

Proposals must be received in the above office by the specified time stated above. All proposals must be time-stamped as accepted by the Purchasing Office by the stated time. Proposals not so stamped will not be accepted. Receipt of a proposal by the State mail system does not constitute receipt of a proposal by the Purchasing Office, for purposes of this RFP.

To ensure confidentiality of the document, all proposals must be packaged, sealed and show the following information on the outside of the package:

- Proposer's name and address
- Request for proposal title (IPAS)
- Request for proposal number (RELB-026)
- Proposal due date (July 18, 2005 2:30 PM)

One (1) original plus two (2) copies of the Cost Proposal must be sealed and submitted in a separate envelope included in the original proposal only. The outside of the envelope must be clearly labeled with the words "Cost Proposal" and name of the vendor.

## 2.6 PROPOSAL ORGANIZATION AND FORMAT

Proposals should be typed and submitted on 8.5 by 11-inch paper bound securely. Proposals should be organized and presented in the order and by the number assigned in the RFP. Proposals must be organized with the following headings and subheadings. Each heading and subheading should be separated by tabs or otherwise clearly marked. The RFP sections which should be submitted or responded to are:

- Tab 1 - Cover page, introduction, completed RFP Form
- Tab 2 - Response to General RFP Requirements, Part II,  
Section G.0.A through G.0 F, including resumes
- Tab 3 - Technical Requirements, Part II  
Sections 0.0.1 through 12.5.3
- Tab 4 - Required forms  
Designation of Confidential and Proprietary Information  
Vendor Information  
Vendor Reference, including subcontractor references
- Tab 5 - Appendix

The vendor must submit its Cost Proposal in a separate sealed envelope as part of the original proposal. Cost should not be detailed in the proposal narrative, but in the cost proposal only.

Failure to provide any requested information in the prescribed format may result in disqualification of the proposal.

## 2.7 MULTIPLE PROPOSALS

Multiple proposals from a vendor will be permissible; however each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc. on each page included in the response. Alternate acquisition plans do not constitute multiple proposals.

## 2.8 ORAL PRESENTATIONS AND DEMONSTRATIONS

Top scoring vendor(s), based on an evaluation of written proposals, may be required to make oral presentations and/or demonstrations to support and clarify their proposals, if requested by DOR. Vendors' proposals should be thorough and complete when submitted. Oral presentations and/or demonstrations may not be used by vendors to remedy incomplete proposals.

DOR will make every reasonable attempt to schedule each presentation or demonstration at a time and location that is agreeable to the proposer. Failure of a proposer to conduct a presentation or demonstration on the date scheduled may result in rejection of the vendor's proposal. Only top scoring proposers, not all vendors submitting proposals, may be invited.

## 2.9 SITE VISITS

During the evaluation process, DOR may conduct a site visit to view the software application described in the proposer's response in a production environment. Selection of the site to visit is at DOR's discretion. Only the apparent top scoring proposals, not all vendors submitted proposals, will be considered. The vendor will be present during the site visit.

The vendor will be responsible for reimbursing DOR for all travel costs within Wisconsin State Travel Guidelines for up to nine (9) DOR staff during this site visit. The vendor will be charged the cost of the site visit whether or not an award is made to the vendor. Not all proposers will receive the opportunity for a site visit. Only the apparent top scoring proposals will be considered. Vendors' proposals should be thorough and complete when submitted. Site visits may not be used by vendors to remedy incomplete proposals.

DOR will make every reasonable attempt to schedule each site visit at a time and location that is agreeable to the proposer. Failure of a proposer to conduct a site visit on the date scheduled may result in rejection of the vendor's proposal. A successful viewing of the vendor's proposed system does not constitute acceptance by DOR.

## 2.10 WITHDRAWAL OF PROPOSALS

Proposals shall be irrevocable until Contract award unless the proposal is withdrawn in writing no later than the date and time proposals are due pursuant to Section 1.9, herein. To accomplish this, the written request must be signed by an authorized representative of the proposer and submitted to Linda Balsiger. If a previously submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the proposal due date and time specified in Section 1.9, herein.

## 2.11 DEVIATIONS OR EXCEPTIONS

Vendors are cautioned to avoid deviations or exceptions in their proposals, which may be cause for disqualification of their proposals. If a vendor intends to deviate from or take exception to any term, condition or specification/requirement, it shall be clearly identified in the proposal, including a clear statement of the nature and extent of the deviation or exception. Failure to do so shall be deemed unqualified acceptance of the RFP term, condition or specification, and the vendor shall be held liable accordingly. The terms and conditions stated in this document will be incorporated into the Contract with the successful vendor. Changes to the terms and conditions of this RFP will be considered (but not necessarily agreed to) during Contract negotiations only if the vendor identified a deviation or exception to the term or condition and proposed alternative language in its proposal. Any terms or conditions stated in Special Contract Terms and Conditions, Standard Terms and Conditions, or Supplemental Standard Terms and Conditions for the Procurement of Services (located in Attachment A) that are directly referencing a State Statute cannot be negotiated.

## 2.12 PROPRIETARY INFORMATION

Any restrictions on the use of data contained within a proposal response must be clearly identified in the proposal itself. The page containing proprietary or confidential information should be marked as such, as well as referenced on the Designation of Confidential and Proprietary Information Form found in Part I Section 6 Required Forms. Proprietary information submitted in response to a request will be handled in accordance with applicable State of Wisconsin procurement regulations and the Wisconsin public records law. Proprietary restrictions normally are not accepted. However, when accepted, it is the vendor's responsibility to defend the determination in the event of an appeal or litigation.

Data contained in a proposal, all documentation provided therein, and innovations developed as a result of the contracted commodities or services cannot be copyrighted or patented. All data, documentation and innovations become the property of the State of Wisconsin.

Any material submitted by the vendor in response to this request that the vendor considers confidential and proprietary information and which qualifies as a trade secret, as provided in sec. 19.36(5), Wis. Stats., or material which can be kept confidential under the Wisconsin public records law, must be identified on the Designation of Confidential and Proprietary Information Form (DOA-3027).

Cost (pricing) always becomes public information and therefore cannot be kept confidential.

3.0 PROPOSAL SELECTION AND AWARD PROCESS

3.1 PRELIMINARY EVALUATION

The proposals will be reviewed to determine if mandatory requirements are met. Failure to meet mandatory requirements will result in the proposal being rejected. In the event that all vendors do not meet one or more of the mandatory requirements, DOR reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

3.2 PROPOSAL SCORING

Accepted proposals will be reviewed by an evaluation committee and scored against the stated criteria. The committee may review references, request oral presentations or demonstrations conduct on-site visits and use the results in scoring the proposals. Proposals from certified Minority Business Enterprises may have points weighted by a factor of 1.00 to 1.05 to provide up to a five percent (5%) preference to these businesses. The evaluation committee's scoring will be tabulated and proposals ranked based on the numerical scores received.

3.3 EVALUATION CRITERIA

The proposals will be scored using the following criteria:

<u>Description</u>	<u>Points</u>	<u>Percentage</u>
General requirements	400	20%
Technical requirements	1100	55%
Cost	<u>500</u>	<u>25%</u>
Total:	2000	100%

3.4 RIGHT TO REJECT PROPOSALS AND NEGOTIATE CONTRACT TERMS

DOR reserves the right to reject any and all proposals and to negotiate the terms of the Contract, including the award amount, with the selected proposer prior to entering into a Contract. If Contract negotiations cannot be concluded successfully with the highest scoring proposer, DOR may negotiate a Contract with the next highest scoring proposer.

If at any time prior to the signing of a Contract, the State reasonably determines that the vendor does not possess adequate financial ability or requisite stability to carry out the obligations of the Contract, that vendor may be disqualified from further consideration. DOR reserves the right to request additional information from third parties.

### 3.5 AWARD AND FINAL OFFERS

DOR will compile final scores (general, technical and costs) for each proposal. The award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible proposer. Alternatively, the highest scoring proposer or proposers may be requested to submit final and best offers. The terms and scoring of the proposals will not be released if final and best offers are requested by DOR. The best and final offers will be evaluated against the stated criteria, scored and ranked by the evaluation committee. The award will then be granted to the highest scoring responsive and responsible proposer. However, a proposer should not expect that DOR will request a final and best offer.

### 3.6 NOTIFICATION OF INTENT TO AWARD

All vendors who respond to this RFP will be notified in writing of DOR's intent to award the Contract as a result of this RFP.

After notification of the intent to award is made, and under the supervision of agency staff, copies of proposals will be available for public inspection from 8:00 a.m. to 4:00 p.m. at the Department of Revenue, 2135 Rimrock Road, Madison WI. Appointments are preferred in order to ensure that space and staff are available to provide assistance and can be made by calling Linda Balsiger at (608) 266-3396.

### 3.7 APPEALS PROCESS

Notices of intent to protest and protests must be made in writing to the Secretary of the Department of Revenue. Protestors should make their protests as specific as possible and should identify Wisconsin statutes and Wisconsin Administrative Code provisions that are alleged to have been violated.

Any written notice of intent to protest the intent to award a Contract must be filed with:

Michael L. Morgan, Secretary  
 Department of Revenue  
 2135 Rimrock Road, MS 624A  
 P.O. Box 8933  
 Madison, WI 53708-8933

and received in his office no later than five (5) working days after the notice of intent to award is issued.

Any written protest must be received within ten (10) working days after the notice of intent to award is issued.

The decision of the Secretary of the Department of Revenue may be appealed to the Secretary of the Department of Administration within five (5) working days of issuance, with a copy of such appeal filed with the Department of Revenue. The appeal must allege a violation of a Wisconsin statute or a section of the Wisconsin Administrative Code.

Copies of any protest or appeal should also be sent to Monica Gannon, Purchasing Director, Department of Revenue, 2135 Rimrock Road, MS6-261, PO Box 8931, Madison, WI 53708-8931.

#### 4.0 SPECIAL CONTRACT TERMS AND CONDITIONS

##### 4.1 PRIME VENDOR / SUBCONTRACTING

The Contractor, also referred to as Prime Contractor, will be responsible for Contract performance whether or not subcontractors are used. However, when subcontractors are used, the subcontractors must abide by all terms and conditions of the Contract.

If subcontractors are used by the Prime Contractor in performing duties or requirements under the Contract, the subcontractors and the functions they will perform under this Contract must be clearly explained in the proposer's response. All terms and conditions that apply to the Contractor, as the Prime, will also apply to the subcontractor. During the life of the Contract, no subcontractor may be used without the prior express written approval of DOR. DOR reserves the right to approve subcontractors for work performed under this Contract. The Contractor shall replace subcontractors found to be unacceptable as reasonably determined by DOR.

##### 4.2 MINORITY BUSINESS ENTERPRISE (MBE) PROGRAM

The State of Wisconsin is committed to the promotion of minority business in the State's purchasing program and a goal of placing 5% of its total purchasing dollars with certified minority businesses. Authority for this program is found in sec. 15.107(2), 16.75(4), 16.75(5) and 560.036(2), Wis. Stats.. DOR is committed to the promotion of minority business in the State's purchasing program.

The State of Wisconsin policy provides that minority-owned business enterprises certified by the Wisconsin Department of Commerce, Bureau of Minority Business Development should have the maximum opportunity to participate in the performance of its contracts. With this procurement, the successful Contractor is strongly urged to use due diligence to further this policy by awarding subcontracts to minority-owned business enterprises or by using such enterprises to provide goods and services incidental to this agreement, with a goal of awarding at least 5% of the Contract price to such enterprises.

In order to satisfy the goal of purchasing five percent (5%) of the goods and services purchased by the Contractor in connection with the performance of its obligations under the Contract from Wisconsin MBEs, the Contractor should utilize Wisconsin MBEs that furnish goods and services required by the Contractor whenever possible.

A listing of certified minority businesses, as well as the services and commodities they provide is available from the Department of Administration, Office of the Minority Business Program, (608) 267-7806. The listing is published on the Internet at: <http://www.doa.state.wi.us/dsas/mbe/index.asp>.

The Contractor shall submit a written report to Procurement on or before January 15, April 15, July 15 and October 15 of each year during the life of the Contract setting forth the amount of goods and services purchased from each MBE during the previous quarter, and its efforts to comply with the MBE purchase goal. The reports must be sent to the Wisconsin Department of Revenue, Attn: Procurement, MS 6-261, P.O. Box 8931, Madison, WI 53708-8931 or faxed to (608) 280-3565.

To claim the five percent (5%) certified minority preference for award of this proposal, check the appropriate box on the Request for Proposal form found on the front of this document and provide proof of certification from the Wisconsin Department of Commerce.

##### 4.3 MASTER LEASE PURCHASE INVOICE AND PAYMENT PROCESS

The cost of this Contract shall be invoiced and paid for according to the Department of Administration Master Lease requirements. The System purchased under this Contract will be paid for and acquired by US Bank, Milwaukee, under a Master Lease Agreement with the State of Wisconsin.

Each payment, as negotiated in the final Contract, will be linked to a set of deliverables. Payment of invoices will not occur until payment increment levels of at least \$100,000.00 are met and deliverables have been accepted by the Department of Revenue. Payment for a release, as described in IPAS Implementation Timeline found in Part II of this RFP, will not be made until the previous Release is completed and has been accepted by DOR in accordance with the terms of the Contract.

Invoices presented for payment must be submitted in accordance with the Contract and with instructions contained on the purchase order including reference to purchase order number and submittal to the correct address for processing. Before payment is made, DOR must verify that all invoiced charges are correct as per the Contract. Only properly submitted invoices shall be officially received for payment.

All invoices must be itemized and show the following information:

- Purchase order number
- Vendor name
- Remit to address
- Prices per the Contract

The original invoice and two copies must be sent to the address/person listed on the purchase order.

Final payment will not be made until DOR determines that the System is operating satisfactorily and according to Contract specifications.

#### 4.4 NONDISCLOSURE AGREEMENT

The Contractor agrees to maintain the confidentiality of any tax information. The Contractor and its employees having access to tax information will be required to sign a "Confidentiality Nondisclosure Agreement" prior to starting work on the project. See Attachment B.

#### 4.5 TASKS, DELIVERABLES AND PROGRESS PAYMENTS

The Contract will describe specifically the nature and goals of each task to be performed by Contractor, when each shall be performed, and the order of performance. The Contract will contain a detailed description of the required products to be delivered by Contractor upon completion of each task, the form each product shall take, and the progress payment, if any, which shall be due upon acceptance by the State of each such deliverable.

#### 4.6 EXECUTED CONTRACT TO CONSTITUTE ENTIRE AGREEMENT

In the event of Contract award, the contents of this RFP (including all attachments), RFP addenda and revisions, and the proposal of the successful proposer, and additional terms agreed to, in writing, by DOR and the Contractor shall become part of the Contract. Failure of the successful proposer to accept these as a contractual agreement may result in a cancellation of award.

The following priority for Contract documents will be used if there are conflicts or disputes.

Official Purchase Order  
DOR Request for Proposal

Vendor's Response to Request for Proposal  
Standard Terms and Conditions and Supplemental Standard Terms and Conditions for the  
Procurement of Services.

#### 4.7 TERMINATION OF CONTRACT

DOR reserves the right to terminate the Contract by giving written notice to Contractor of such termination and specifying the effective date thereof, at least thirty (30) calendar days before the effective date of such termination. Contractor shall, in the event of such termination, be entitled to receive compensation for any deliverables accepted hereunder in accordance with the progress payment schedule as set forth in the Contract. Contractor shall also be compensated for partially completed deliverables in the event that termination was not for cause. The compensation for such partially completed deliverables shall be equal to the percentage of completion of each, as determined by DOR, times the corresponding progress payment set forth in the Contract.

Upon termination or other expiration of the Contract, each party shall forthwith return to the other all papers, materials, and other properties of the other held by each for purposes of performance of the Contract. In addition, each party will assist the other party in the orderly termination of the Contract and the transfer of all aspects hereof, tangible or intangible, as may be necessary for the orderly, nondisruptive business continuation of each party.

#### 4.8 ACCEPTANCE/STANDARD OF PERFORMANCE

After installation of a specific release is complete, Contractor shall certify in writing to DOR that the IPAS release is installed and ready for use in full production on the State's designated equipment. With Contractor's assistance, DOR shall begin performing acceptance tests within thirty (30) days of receipt of such notification. The tests will determine whether the following acceptance criteria are met:

4.8.1 The release operates in conformity with all of the applicable Contract technical specifications and functional descriptions.

4.8.2 The release does not require modifications to DOR's other operational software systems, unless agreed to by DOR in advance, and does not cause performance degradation of other software systems operating on the State's computing system and network.

The acceptance period of ninety (90) consecutive calendar days shall commence within thirty (30) calendar days of the implementation date of each release of IPAS into production, at which time operational control becomes the responsibility of DOR. Once the IPAS release meets DOR's acceptance criteria for ninety (90) calendar days from the commencement of the acceptance period it shall be deemed to have met DOR's standard of performance. DOR will give notice to Contractor as to the actual date when the acceptance period will begin.

#### 4.9 ACCESS TO FACILITIES

Unless otherwise agreed upon by the parties, any and all access by Contractor's employees to the facilities of the State shall be during normal State office hours and all Contractor employees shall be subject to the State site's security procedures.

#### 4.10 ACCESS TO SOFTWARE

Contractor, its agents or employees shall have access to inspect or observe DOR's use of IPAS at reasonable times upon first giving notice to DOR of Contractor's intent to perform such inspection.

4.11 DOCUMENTATION AND OPERATING MANUALS

Contractor shall provide, at no additional charge, operating manuals, which describe in detail IPAS' capabilities, operation, installation procedures, error messages with identification of probable causes, software modification procedures and techniques, and program interfaces. Updated, revised, or replacement manuals published by Contractor shall be provided free of charge pursuant to the requirements specified in this section. Contractor agrees that DOR may make such additional copies of documentation supplied pursuant to this section as are needed for use by employees.

All documentation delivered under this Contract shall conform to the documentation standards of the State. Contractor will furnish the State with the following documentation, which will be in form and substance at least equal to comparable material generally in use in the industry in the following quantities:

<u>DOCUMENTATION</u>	<u>PAPER QUANTITY</u>	<u>CD QUANTITY</u>
User's Manual	25	1
Systems Manual	25	1
Operating Manual	25	1
Programming Manual	10	1
Modification Manual	10	1

4.12 FIXES, UPGRADES AND FUTURE SOFTWARE OPTIONS

4.12.1 **FIXES:** For a period of not less than twelve (12) months after the State's acceptance of each release of IPAS, Contractor shall correct any and all errors in the System, regardless of whether the error is brought to the attention of Contractor by one of the Contractor's customers that is using any of the software that is part of the Base COTS Product or by DOR, or by any other person. Contractor shall provide DOR with program fixes for errors within thirty (30) days after Contractor is made aware of the errors; provided, however, that upon request of DOR, Contractor shall correct any error reasonably deemed important to DOR's continued use of the Modified COTS Product within five (5) days after DOR has notified Contractor in writing of the error.

4.12.2 **UPGRADES AND ENHANCEMENTS:** For a period of not less than twelve (12) months after DOR's acceptance of IPAS releases, Contractor shall provide to the State, at no additional cost, any changed or enhanced versions of the Base COTS Product within forty-five (45) days after the changed or enhanced versions are made available to customers. DOR shall have the option to perform an acceptance test as specified in the Contract and to accept the changed or revised version in lieu of the Base COTS Product it had accepted previously.

4.12.3 **FUTURE SOFTWARE OPTIONS AND REPLACEMENT SOFTWARE:** Contractor grants DOR the option, for any software for which DOR has paid a one-time purchase or license fee, to acquire any software options or replacement software which Contractor shall make available after the acceptance date at the lesser of (a) Contractor's published purchase price for the software options or replacement software, or (b) the difference between Contractor's published purchase price for the replacement software or software options and the current or most recent purchaser license fee for the software or software options previously acquired by DOR under the Contract. This provision shall remain in effect for the duration of the Contract.

4.13 INSTALLATION

DOR agrees to have IPAS installation site prepared in accordance with Contractor's written specifications prior to the installation date. The State shall provide reasonable access to the installation site to enable Contractor to plan the installation.

A complete installation plan for installing and certifying IPAS must be provided by the Contractor. The plan must detail all activities to successfully install and operate IPAS including but not limited to regeneration of other system software, allocation of computer files required for IPAS (including storage requirements), renaming of software entities to conform to installation site naming standards and security authorizations.

Except for software which has been specifically designated in Contractor's response to DOR's RFP as customer-installed, Contractor agrees to provide expert staff at the State's installation site on the date specified in DOR's Contract to install or direct the installation of IPAS. Such expert staff shall remain at the State's installation site as needed until IPAS has been successfully installed and certified as ready for acceptance testing by Contractor. Upon completion of the installation, Contractor shall provide written certification to the State that the most recent version of the Modified COTS Product has been installed with all program fixes for known errors and that the IPAS release is ready for acceptance testing.

For software which has been specifically designated in Contractor's response to DOR's RFP as customer-installed, Contractor agrees to furnish detailed step-by-step installation procedures to DOR and to have available, at no additional cost to DOR, expert assistance by telephone to answer the questions and resolve any problems encountered by DOR's installer. At DOR's request, subject to the charges for technical services listed in Contractor's response to DOR's RFP, Contractor shall furnish expert assistance at DOR's installation site during the installation of any software designated as customer-installed.

#### 4.14 LICENSE AND TITLE

4.14.1 Contractor will grant an irrevocable, fully paid-up license for the Licensed Software that will permit DOR to reproduce, perform and display the Licensed Software for DOR's own use as follows:

4.14.1.1 To use in DOR's development, testing, production, maintenance, and training environments for the Licensed Software.

4.14.1.2 To transfer the license to and to use the Licensed Software on: (a) a backup environment wherein the designated environment or an associated unit required for use of the Licensed Software is temporarily inoperable until the designated environment is restored to operable status and processing on the backup environment is completed or; (b) another environment for assembly or compilation of the Licensed Software if the designated environment and its associated units do not provide the configuration required for such assembly or compilation.

4.14.1.3 To use the Licensed Software on any other environment within the DOR or DOA data center.

4.14.1.4 To copy the Licensed Software for safekeeping (archives) or backup purposes.

4.14.1.5 To combine the Licensed Software with other programs or material for DOR's own use.

- 4.14.1.6 If Contractor ceases to do business and/or the Base COTS Product or the Modified COTS Product is no longer supported by Contractor, DOR gains all rights to modify the Licensed Software for DOR's own use.
- 4.14.2 Nothing contained herein shall be construed to restrict or limit the State's rights to use any technical data or software applications, which the State may already possess or acquire under proper authorization from other sources.
- 4.14.3 The Contractor shall place in escrow copies of source code, System reference tables, object code and related materials for the Licensed Software and related documentation. Whenever the Contractor provides updated software to DOR pursuant to Section 4.12 Fixes, Upgrades and Future Software Options, hereof, the Contractor promptly will place in escrow the source code, System reference tables, object code and related materials for the upgraded software. The terms of the escrow agreement must be approved in advance by DOR. The escrow agreement will provide that DOR will receive thirty (30) days written notice before the Contractor changes escrow agents or the escrow is terminated. The purpose of this provision is to provide DOR access to and use of the Licensed Software for auditing or continued operations should the Contractor suffer from any condition such that it could not continue operations.
- 4.14.4 Contractor represents and warrants that it is the sole owner of the Base COTS Product and the Licensed Software and its use will not violate or infringe upon any patent, copyright, trade secret or other property right of any other person or, if not, the Contractor has received all proper authorizations from the owner(s) to copy and modify the Base COTS Product and to sell or license the Base COTS Product and any copies or modifications thereof to the Contractor's customers, and that the Contractor the has the full right and power to grant the rights contained in the Contract.

The Contractor shall indemnify and hold harmless DOR and its respective officers, agents and employees from liability of any nature or kind (including judgments, costs and attorneys' fees) relating to or arising out of any claim of infringement of copyright, trademark, trade name, service mark or patent or other intellectual property.

If the Licensed Software becomes the subject of a lawsuit or claim of infringement or the Contractor becomes aware that the Licensed Software is likely to become the subject of a lawsuit or claim of infringement, then the Contractor may exercise one of the following two options in order to provide DOR with continued uninterrupted use the Licensed Software:

- a. Obtain for DOR the right to continue the use of the alleged infringing item at no additional cost to DOR; or
- b. Substitute for the alleged infringing item other equivalent or better items deemed satisfactory by DOR at no additional cost to DOR.

#### 4.15 LICENSED PROGRAM TESTING

For each Licensed Software product release, the testing period, if any, during which the software product will be made available for non-production use, is specified in Contractor's response to DOR's RFP. The purpose of the testing period is to determine whether the Licensed Software product functions effectively and to assist DOR in determining whether each Licensed Software product release meets DOR's requirements. Each testing period will begin ten (10) calendar days after shipment from Contractor of the Licensed Software product, but in no event prior to DOR's receipt of the Licensed Software product, unless otherwise expressly provided herein.

Subsequent releases by Contractor, if any, of any Licensed Software which has the same program number as Licensed Software provided pursuant to the Contract shall be made available to DOR

for production use and/or testing on an environment specified while DOR continues production use of a previous release of that software on that environment.

#### 4.16 LIMITATION OF COST

It is hereby stipulated and agreed that the total cost to DOR for the performance of the work under the Contract will not exceed the funding limitation set forth in DOR's purchase order and the Contractor agrees to perform the work specified and all obligations under the Contract within such funding limitation. Contractor agrees to notify DOR in writing no later than when the billable amounts reach eighty percent (80%) of the funding limitation in an order and will include in such notification an estimate to complete the requirements of the order. DOR shall not be obligated to reimburse Contractor for billing in excess of the funding limitation set forth in the order, and Contractor shall not be obligated to continue performance of work under the order or to incur costs in excess of the funding limitations if such increased costs are due to additional requirements identified by DOR after the initiation of effort on the work specified in the order, unless and until a change order or amendment to the order increasing the funding limitation is approved by DOR.

#### 4.17 MAINTENANCE ASSURANCE

Contractor agrees to make available to DOR maintenance services for as long as the Licensed Software is utilized by the State. Such services shall be available at the prices contained in Contractor's response to DOR's RFP, but shall in no event exceed these prices plus current Consumer Price Index per year for each year after the date of acceptance of the software.

#### 4.18 ONGOING PERFORMANCE REQUIREMENT

All Licensed Software installed as a result of the Contract must continue to perform each month following acceptance during the effective life cycle of that software as specified in DOR's request for proposal and as provided for in Contractor's response with respect to costs.

#### 4.19 PERMISSION TO MODIFY

DOR may modify the Licensed Software, except for the unmodified portions of Base COTS Product incorporated into the Licensed Software, and/or merge such materials into other program material to form an updated work product for DOR's own use. Any portion of the Licensed Software included in any such updated work product will continue to be subject to all applicable terms and conditions of the Contract. However, any original work product of DOR in such updated work product and any other original work product of DOR used together with the Licensed Software shall be the exclusive property of DOR.

If Contractor ceases to do business and/or the Licensed Software is no longer supported by Contractor, the State gains all rights to modify the Licensed Software.

#### 4.20 PROGRAM SERVICES

For each Licensed Software product, the type(s) and period(s) of program services, if any, to be provided without additional charge for a current release of the Licensed Software product must be specified in proposer's response to DOR's RFP.

Program services will commence at the beginning of the Licensed Software testing period or, if there is no testing period for that license, when the charges, other than charges for early shipment of licensed printed materials, are due.

LOCAL SERVICES: When a problem occurs which DOR determines is caused by the use of the Licensed Software and the diagnosis of Contractor's designated representative indicates the problem is caused by a defect in the unaltered portion of a current release of the Licensed Software, Contractor's designated representative will perform the following problem resolution activities:

- a. Attempt to correct or bypass the defect by providing DOR with correction information; or
- b. Submit documentation of the problem to the appropriate Contractor personnel for resolution; and in any event,
- c. If the Licensed Software is inoperable, make every reasonable effort to resolve the problem by applying a local fix or providing a bypass.

#### 4.21 PROTECTION AND SECURITY OF LICENSED SOFTWARE MATERIALS

The State shall maintain sufficient records to identify the number and location of all copies of the Licensed Software and shall notify Contractor in writing if the original or any copy of the Licensed Software will be kept at an installation other than that of the environments designated. The State shall reproduce and include the copyright notice on any such copies in accordance with the copyright instructions, if any, provided by Contractor.

The State shall insure, prior to disposing of any media, that any of the Licensed Software contained thereon has been erased or otherwise destroyed.

#### 4.22 RELOCATION OF SOFTWARE

DOR may transfer the Licensed Software to any other Wisconsin State entity after giving notice to Contractor and specifying the location and environments where the Licensed Software will be installed.

#### 4.23 RETURN OR DESTRUCTION OF LICENSED SOFTWARE

Within thirty (30) days from the date of discontinuance by DOR of any Licensed Software, DOR shall notify Contractor in writing, that through DOR's best efforts, and to the best of DOR's knowledge, the original and all copies of any Licensed Software received from Contractor or made in connection with such license have been returned or destroyed. This requirement will apply to all copies in any form including translations, whether partial or complete, and whether or not modified or merged into other program materials as authorized herein. However, upon prior written authorization from Contractor, DOR may retain a copy for archive purposes only.

When DOR has been licensed by Contractor to use a new version of the Licensed Software, which carries a different program number under an amendment to the Contract, DOR may retain the prior version of the Licensed Software for a period not to exceed ninety (90) days following the date of discontinuance of prior version of said programs; provided, however, that the retained prior version of said programs may be used by DOR only if a defect in the new version prevents its use. Within thirty (30) days immediately following said ninety (90) day period, DOR will certify in writing to Contractor that all copies of program materials received or made in connection with the prior version have been returned to Contractor or destroyed as set forth above.

#### 4.24 SITE PREPARATION

The Contractor agrees to furnish DOR with specifications for the product(s) environment twelve (12) weeks prior to the need for environments to be in place and ready to use.

DOR agrees to furnish to Contractor, at the time of its order for Licensed Software, current information as to the specific hardware and software for the operating environment in which the Licensed Software will be installed. DOR also agrees to furnish Contractor with specific instructions as to naming standards and devices that must be used for the Licensed Software.

Contractor will notify DOR no later than thirty (30) days before the specified installation date of any changes in the operating environment required to install and operate the Licensed Software. Contractor will specify in detail any space, equipment, staff, and computer time that DOR must provide for installation to take place. Contractor will also specify any operating environment options DOR must have installed prior to installation.

In any case, Contractor is expected at a minimum to fulfill its obligation to deliver and install the Licensed Software to operate in the environment as specified in DOR's RFP, unless otherwise notified in writing by DOR.

#### 4.25 SOFTWARE STANDARDS

Contractor agrees to make every reasonable effort to furnish documentation and machine-readable programs, which will conform to industry standards for such documentation and programs used at DOR's installation site. DOR agrees that it will make every reasonable accommodation to its standards and procedures to enable Contractor's Licensed Software to operate efficiently and effectively on DOR's computer system.

Any software delivered will be developed by Contractor to operate within DOR's environment as described in the DOR's solicitation document and DOR's order.

Contractor agrees that all software and other products delivered will comply with DOR's applicable standards or as otherwise specified in DOR's RFP. DOR agrees that it will make every reasonable accommodation to its standards and procedures to enable Contractor's Licensed Software to operate efficiently and effectively on DOR's computer system.

Contractor agrees that all products or elements to be delivered hereunder shall comply with all applicable provisions of standards or draft standards issued by the American National Standards Institute.

#### 4.26 SPECIFIED OPERATING ENVIRONMENT

The Licensed Software shall be designed to operate in one or more environment types and, in most instances, in conjunction with other vendor's equipment and software. Contractor's response to DOR's RFP shall state the environments in which the Licensed Software is designed to operate.

DOR reserves the right to exchange copies of the Licensed Software designed to operate in one operating environment for copies designed to operate in another operating environment in which Contractor has stated the Licensed Software is designed to operate. Should DOR exercise this right it will pay any costs of shipping and handling involved in the exchange as well as any positive cost difference between the two licenses.

Contractor acknowledges that the environment of equipment and software in which the Licensed Software will operate will be subject to frequent changes and enhancements other than those supplied by Contractor. Contractor agrees to cooperate with DOR and other vendors of equipment and software to support the stable operation of the Licensed Software so long as DOR maintains a compatible, operating environment.

#### 4.27 TECHNICAL SERVICES

Contractor's technical personnel shall be available to assist DOR in implementation, review, and improvement of existing computer systems and to advise on programming, development, and implementation of IPAS involving the Licensed Software. Charges, if any, for this assistance have been included in Contractor's response to DOR's RFP and these charges will increase by no more than the current Consumer Price Index per year. Any actual changes in the charges for technical services will require mutual agreement and are subject to the Pricing and Discount provisions of the Standard Terms and Conditions of the Contract.

#### 4.28 PROGRESS REPORTS

Contractor shall submit a weekly progress report to DOR. The progress report will describe the status of Contractor's performance since the preceding report, including the products delivered and the progress expected to be made in the next succeeding period. Each report shall describe Contractor's activities by reference to the schedule of deliverables included in DOR's Contract. Reports shall be sent to the Project Director designated by DOR.

#### 4.29 RESPONSIBILITIES OF CONTRACTOR

Contractor agrees:

- 4.29.1 To perform those tasks and deliver the products identified in the Contract.
- 4.29.2 To comply with all security regulations in effect at DOR's premises and externally for materials belonging to DOR or to the project.
- 4.29.3 To assign to the project on a full-time basis, Contractor's employees, agents or representatives to assist in fulfilling its performance under the Contract.
- 4.29.4 To appoint a Project Director for liaison and consultation with DOR. The Project Director shall have authority to make managerial and technical decisions concerning the project.
- 4.29.5 To correct all errors in IPAS found by DOR or Contractor for a period of twelve (12) months after acceptance by DOR. Such corrections shall commence within forty-eight (48) hours after DOR's written notification to Contractor.

#### 4.30 RESPONSIBILITIES OF DOR

DOR agrees:

- 4.30.1 To arrange for necessary cooperation by DOR's officials and employees, including providing access to such records and other information needed by Contractor to carry out the work set forth in DOR's Contract, and to render written decisions on matters affecting the progress of the work promptly after receipt of Contractor's request for such decisions.
- 4.30.2 To appoint a Project Director for liaison and consultation with Contractor. The Project Director shall have authority to make managerial and technical decisions concerning the project and to accept or approve Contractor's work on behalf of DOR. DOR's Project Director shall not have authority to amend or in any way modify the provisions of the Contract.

4.30.3 To deliver the following items on a timely basis for each release if specified in the Contract: (1) source software in machine-readable form; (2) a representative test data sample to exercise all items referenced in the Contract; (3) currently available detailed documentation and specifications; (4) output reports produced by any delivered programs from existing source software and (5) assignment of the file and software nomenclature. Delayed delivery of any of the above-specified items for each release shall result in a day-to-day extension of the completion date for that release.

#### 4.31 RIGHT TO APPROVE CHANGES IN STAFF

DOR in its sole discretion shall approve or disapprove a proposed change in the project staff from those listed herein. In each instance, DOR will be provided with a resume of the proposed substitute and an opportunity to interview that person prior to giving its approval or disapproval. DOR shall not unreasonably withhold its approval.

#### 4.32 STANDARDS OF WORK

Contractor agrees that the performance of work and services pursuant to the Contract shall conform to the requirements of the Contract and to the highest possible professional standards.

#### 4.33 WARRANTY OF OPERATION

Contractor warrants that the Licensed Software delivered hereunder will, at the time of delivery, be free from defects that would materially impact DOR's ability to use the Licensed Software for its intended purposes. Furthermore, the Licensed Software will meet the specifications set forth in the Contract, or the Contractor will without charge to DOR correct any such defects and make such additions, modifications, or adjustments to the software as may be necessary to keep the software in operating order in accordance with such specifications for twelve (12) months.

#### 4.34 CONTRACTOR DEFAULT: REMEDIES OF DOR

DOR shall be free to invoke any and all remedies permitted under Wisconsin law.

#### 4.35 ADDITIONAL TERMS AND CONDITIONS

Additional terms and conditions of this Contract are set forth in the Standard Terms and Conditions and Supplemental Standard Terms and Conditions found in Attachment A. If a conflict exists, this Part 1 Section 4 Special Terms and Conditions of the RFP shall take precedence over Standard Terms and Conditions and Supplemental Standard Terms and Condition for Procurements for Services.

### 5.0 COST PROPOSAL

#### 5.1 GENERAL INSTRUCTIONS ON PREPARING COST PROPOSALS

The cost proposal should be submitted in a separate sealed envelope with the original written proposal. The proposal will be scored using a standard quantitative calculation where the most points will be awarded to the proposal with the lowest cost. Various costing methodologies and models are available to analyze the cost information submitted to determine the lowest costs to DOR. DOR will select one method and use it consistently throughout its analysis.

A five (5) year life-cycle cost analysis will be used in the evaluation of the cost proposals. S.16.75(1m), Wisconsin Statutes, provides that the DOR shall consider life-cycle cost estimates in the award of contracts for materials, supplies or equipment, whenever such action is appropriate.

DOR will evaluate the proposals based on a five (5) year life-cycle costing formula. As a result, the award may not go to the lowest initial cost proposer.

For the purpose of life-cycle cost analysis, use the Projected 5-Year IPAS Project Plan (Phase 1) found in Part 1 Section 1.9 Delivery. The following will be used to figure the life-cycle cost formula:

- Base COTS Product (license, maintenance, etc.) and installation costs
- Other add-on COTS Product (license, maintenance, etc.) and installation costs
- Customization or modification costs
- Implementation and interfacing costs of the System
- Training costs
- Documentation costs
- Data conversion costs
- Certain costs, as detailed in Part II Requirements, that must be listed separately
- Any other costs associated to implementing the IPAS System into full production mode
- Twelve month warranty period for each release;

## 5.2 FORMAT FOR SUBMITTING COST PROPOSALS

Cost proposal must be submitted on the Cost Spreadsheet found in Part I Section 6, Required Forms. Provide a cost for each release. Itemize costs for each release as stated on the form. Various requirements in Part II state that the cost of certain functionality or feature be priced separately. Proposer must provide cost detail on the Cost Spreadsheet as requested. If specific items are being provided at no additional cost, proposer must state so.

If vendor proposes additional related functionality that is not specifically covered by the requirements in Part II, provide a description and price on the Cost Spreadsheet under Additional Functionality or Features. Also provide hourly rates for specific positions listed on the Cost Spreadsheet in Part I Section 6. These hourly rates and the Additional items will not be used in the evaluation of the cost proposal.

## 5.3 FIXED PRICE PERIOD

All costs and conditions outlined in the proposal shall remain fixed and valid for acceptance for one hundred and twenty (120) days starting on the due date for proposals.

# SECTION 6

## REQUIRED FORMS

**PROPRIETARY ACKNOWLEDGMENT AGREEMENT**

**DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION**

**VENDOR INFORMATION**

**VENDOR REFERENCE**

**NOTICE OF INTENT TO SUBMIT PROPOSAL**

**COST SPREADSHEET**

**PROPRIETARY ACKNOWLEDGMENT AGREEMENT**

Vendor Name & Address: \_\_\_\_\_

WHEREAS the Wisconsin Department of Revenue (“DOR”) intends to release to vendors Request for Proposal RELB-026 that will provide access to attachments that will contain certain confidential and/or proprietary information, namely the WPAM Volumes I and II, the Micro Cost Program and the Business Process Model, identified as Attachments E, F, G and H (the “Proprietary Information”); and

WHEREAS Vendor desires to obtain the Proprietary Information in order to submit a proposal to DOR; and

WHEREAS DOR desires the Proprietary Information to be used by Vendor for the sole purpose of preparing a response to Request for Proposal RELB-026, since dissemination or disclosure of the Proprietary Information and its terms will adversely and irreparably affect DOR’s operations, at a fiscal harm to the State of Wisconsin that cannot be measured readily, and DOR is making a Proprietary Acknowledgment Agreement an express condition of vendors being permitted access necessary to submit proposals relating to the Proprietary Information.

IT IS HEREBY AGREED AS FOLLOWS:

1. Proprietary Acknowledgment. Vendor hereby agrees for itself and on behalf of its agents and employees that the Proprietary Information, and the terms thereof, are and shall remain absolutely confidential and that none of them shall copy, distribute or disclose the Proprietary Information or any of the terms thereof to any third party, person, firm, association or organization. Vendor agrees to take all necessary steps to maintain confidentiality of the Proprietary Information.
2. Violation. Vendor acknowledges that breach of this Proprietary Acknowledgment Agreement will result in irreparable and continuing damage to DOR, for which money damages will not provide adequate relief. Vendor therefore agrees that in the event that this Agreement is violated by Vendor, DOR and the State of Wisconsin shall be entitled to bar the Vendor from being offered any contract for this or any other proposal in the future, and furthermore to consider breach of this Agreement a breach of all other contracts that Vendor has with DOR or any other Wisconsin state agency. Nothing in this agreement shall be construed as prohibiting DOR from availing itself of any other remedy. If DOR is required to enforce this Agreement then Vendor shall be responsible for all costs and expenses of enforcement, including reasonable attorneys’ fees.
3. Return of Materials. In the event Vendor declines to submit a proposal to DOR with regard to the Proprietary Information, or in the event Vendor is not successful in reaching a contract with DOR regarding the Proprietary Information, or upon request by DOR, Vendor will return all copies of the Proprietary Information forthwith to DOR and immediately destroy all documents relating to the Proprietary Information and the terms thereof.
4. Authority. The undersigned affirmatively represents that he or she is authorized to do so and that Vendor has agreed to be and shall be bound by the terms hereof.
5. Survival. The terms of numbered paragraphs 1 and 2 of this Proprietary Acknowledgment Agreement shall survive the termination of this Agreement and shall not be affected by waiver or merger.

Dated this \_\_\_\_ day of \_\_\_\_\_, 2005.

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(printed name and title)

\_\_\_\_\_  
(phone)

May 18, 2005

Return signed form via fax or email to Linda Balsiger at:  
Fax number: (280) 266-3565  
Email: lbalsige@dor.state.wi.us

STATE OF WISCONSIN  
DOA-3027 N(R01/98)

**DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION**

The attached material submitted in response to Bid/Proposal # RELB-026 includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released without our written approval.

**Prices always become public information when bids/proposals are opened, and therefore cannot be kept confidential.**

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released

Section	Page #	Topic
_____		
_____		
_____		
_____		

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY AND AGREES TO HOLD THE STATE HARMLESS FOR ANY COSTS OR DAMAGES ARISING OUT OF THE STATE'S AGREEING TO WITHHOLD THE MATERIALS.

Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The state considers other markings of confidential in the bid/proposal document to be insufficient. The undersigned agrees to hold the state harmless for any damages arising out of the release of any materials unless they are specifically identified above.

Company Name \_\_\_\_\_

Authorized Representative \_\_\_\_\_  
Signature

Authorized Representative \_\_\_\_\_  
Type or Print

Date \_\_\_\_\_

This document can be made available in accessible formats to qualified individuals with disabilities.

STATE OF WISCONSIN  
DOA-3477 (R05/98)

Bid / Proposal # \_\_\_\_\_

Commodity / Service \_\_\_\_\_

**VENDOR INFORMATION**

1. BIDDING / PROPOSING COMPANY NAME \_\_\_\_\_

FEIN \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Toll Free Phone ( ) \_\_\_\_\_

FAX ( ) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_

2. Name the person to contact for questions concerning this bid / proposal.

Name \_\_\_\_\_ Title \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Toll Free Phone ( ) \_\_\_\_\_

FAX ( ) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_

3. Any vendor awarded over \$25,000 on this contract must submit affirmative action information to the department. Please name the Personnel / Human Resource and Development or other person responsible for affirmative action in the company to contact about this plan.

Name \_\_\_\_\_ Title \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Toll Free Phone ( ) \_\_\_\_\_

FAX ( ) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_

4. Mailing address to which state purchase orders are mailed and person the department may contact concerning orders and billings.

Name \_\_\_\_\_ Title \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Toll Free Phone ( ) \_\_\_\_\_

FAX ( ) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_

5. CEO / President Name \_\_\_\_\_

This document can be made available in accessible formats to qualified individuals with disabilities.

**VENDOR REFERENCE**

FOR VENDOR: \_\_\_\_\_

Provide company name, address, contact person, title of contact person, project role, telephone number, and appropriate information on the product(s) and/or service(s) as requested in the RFP. (See Part I Section 2.3 and Part II G.O.D. for requirements) If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement. Copy this form as needed. Submit separate form for subcontractors.

Company Name \_\_\_\_\_  
Address (include Zip +  
4) \_\_\_\_\_  
Contact Person \_\_\_\_\_ Title \_\_\_\_\_  
Project Role \_\_\_\_\_ Phone \_\_\_\_\_  
No. \_\_\_\_\_

Product(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Company Name \_\_\_\_\_  
Address (include Zip +  
4) \_\_\_\_\_  
Contact Person \_\_\_\_\_ Title \_\_\_\_\_  
Project Role \_\_\_\_\_ Phone \_\_\_\_\_  
No. \_\_\_\_\_

Product(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Company Name \_\_\_\_\_  
Address (include Zip +  
4) \_\_\_\_\_  
Contact Person \_\_\_\_\_ Title \_\_\_\_\_  
Project Role \_\_\_\_\_ Phone \_\_\_\_\_  
No. \_\_\_\_\_

Product(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Company Name \_\_\_\_\_  
Address (include Zip + 4) \_\_\_\_\_  
Contact Person \_\_\_\_\_ Title \_\_\_\_\_  
Project Role \_\_\_\_\_ Phone \_\_\_\_\_  
No. \_\_\_\_\_

Product(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

This document can be made available in accessible formats to qualified individuals with disabilities.

**NOTICE OF INTENT TO SUBMIT PROPOSAL**

**WISCONSIN DEPARTMENT OF REVENUE  
INTEGRATED PROPERTY ASSESSMENT SYSTEM (IPAS)  
RFP RELB-026**

Vendor Name \_\_\_\_\_

Address \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

We are interested in attending the Vendor Conference on Monday June 13, 2005 at 9:00 A.M. in the Events Room at 2135 Rimrock Road, Madison WI. YES \_\_\_\_\_ OR NO \_\_\_\_\_

If yes, please estimate possible number of attendees: \_\_\_\_\_

Return this Notice of Intent via fax or email **by Noon June 6, 2005** to:

Linda Balsiger, Purchasing Agent  
Wisconsin Department of Revenue  
FAX- (608) 280-3565  
EMAIL- lbalsige@dor.state.wi.us

If you do not submit this notice, you can still submit a proposal if you meet the proposal due date. Any supplemental written information or amendments related to this RFP will be provided automatically to those vendors who have filed a notice of intent or to vendors who request such information and will be posted on VendorNet.

**COST SPREADSHEET**

**A five (5) year life cycle cost is required.** Refer to projected 5 year delivery schedule found in Part 1 Section 1.2.4. Total costs are requested for each release of IPAS. Requirements for Releases 1 through 6 may be found in Part II Section G.0.F and Sections 1 through 12.

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 1 IPAS Base System</u></b></p> <p>Release 1 includes the following Part II Technical Requirements: General System Requirements (1.0.0 – 1.6.1); Database Design (Section 2); Data Maintenance (Section 3); Query, Analysis &amp; Reporting (Section 4); and System Support (12.5.0 – 12.5.3)</p> <ol style="list-style-type: none"> <li>1) COTS Product/s Initial License Fee Through 12/31/2009 (list separately)</li> <li>2) Annual License Fees through 12/31/2009 (list separately)</li> <li>3) Annual Maintenance Fees through 12/31/2009 (Section 12.4.1) (list separately)</li> <li>4) Installation/Implementation/Interfacing Costs (Section 1.4.10)</li> <li>5) Training Costs (Section 12.3.1)</li> <li>6) Documentation Costs</li> <li>7) Customization/Modification Costs</li> <li>8) IPAS Sales Data (Section 2.5.1)</li> <li>9) Cost for 10,000 sketch conversions (Section 3.3.3)</li> <li>10) Query, Analysis and Reporting Software (Section 4.1.1)</li> <li>11) Standard Property Record Card (Section 4.3.1)</li> <li>12) Assessment Rolls (Section 4.3.2)</li> <li>13) 12-month Warranty</li> <li>14) Data Conversion Costs (Section 12.5.1 through 12.5.3)</li> </ol> <p><b>15) Additional Costs – Describe and reference requirement number.</b></p>		
	<b>RELEASE 1 SUBTOTAL</b>	<b>\$</b>

**COST SPREADSHEET**

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 2 Sales Database</u></b></p> <p>Release 2 includes: Sales and Ratio Studies (Part II Technical Requirements 10.0.0 - 10.2.3).</p> <p>1) COTS Product/s Initial License Fee Through 12/31/2009 (list separate)</p> <p>2) Annual License Fee through 12/31/2009 (list separate)</p> <p>3) Annual Maintenance Fee through 12/31/2009 (list separate)</p> <p>4) Installation/Implementation/Interfacing Costs</p> <p>5) Training Cost</p> <p>6) Documentation Costs</p> <p>7) Customization/Modification Costs</p> <p>8) 12-Month Warranty</p> <p>9) Additional Costs – Describe an reference requirement number</p>		
	<b>RELEASE 2 SUBTOTAL</b>	<b>\$</b>

**COST SPREADSHEET**

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 3 Cost Method of Valuation</u></b></p> <p>Release 3 includes Cost Method of Valuation (Part II Technical Requirements Section 6).</p> <p>1) COTS Product/s Initial License Fee Through 12/31/2009 (list separate)</p> <p>2) Annual License Fee through 12/31/2009 (list separate)</p> <p>3) Annual Maintenance Fee through 12/31/2009 (list separate)</p> <p>4) Installation/Implementation/Interfacing Costs</p> <p>5) Training Cost</p> <p>6) Documentation Costs</p> <p>7) Customization/Modification Costs</p> <p>8) Marshall &amp; Swift Commercial Estimator (Section 6.1.1)</p> <p>9) Residential and Agricultural Cost Valuation (Section 6.1.2)</p> <p>10) MCost Program Modifications (Section 6.1.3)</p> <p>11) 12-Month Warranty</p> <p>12) Additional Costs – Describe and reference requirement number</p>		
	<b>RELEASE 3 SUBTOTAL</b>	\$

**COST SPREADSHEET**

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 4 Valuation Other Than Cost</u></b></p> <p>Release 4 includes the following Part II Technical Requirements: Land Valuation (Section 5); Comparable Sales Analysis and Valuation Processes (Section 7); Income Approach (Section 8); Value Reconciliation (Section 9); Sales and Ratio Program (10.3.1 - 10.4.3); and System Administration (11.0.0 - 11.5.3).</p> <p>1) COTS Product/s Initial License Fee Through 12/31/2009 (list separate)</p> <p>2) Annual License Fee through 12/31/2009 (list separate)</p> <p>3) Annual Maintenance Fee through 12/31/2009 (list separate)</p> <p>4) Installation/Implementation/Interfacing Costs</p> <p>5) Training Costs</p> <p>6) Documentation Costs</p> <p>7) Customization/Modification Costs</p> <p>8) Adaptive Estimation Procedures (Section 7.1.12)</p> <p>9) Artificial Neural Networks (Section 7.1.13)</p> <p>10) State Telecommunication (Telco) Assessment and Taxation (Section 11.3.1)</p> <p>11) Additional Costs – Describe and reference requirement number</p>		
	<b>RELEASE 4 SUBTOTAL</b>	\$

**COST SPREADSHEET**

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 5 Geographic Information System (GIS)</u></b></p> <p>Release 5 includes GIS (Part II Technical Requirements 1.7.1 - 1.7.12).</p> <p>1) COTS Product/ Initial License Fee Through 12/31/2009 (list separately)</p> <p>2) Annual License Fee through 12/31/2009 (list separately)</p> <p>3) Annual Maintenance Fee through 12/31/2009 (list separately)</p> <p>4) Installation/Implementation/Interfacing Costs</p> <p>5) Training Costs</p> <p>6) Documentation Costs</p> <p>7) Customization/Modification Costs</p> <p>8) GIS Interface, Integration and Installation (Section 1.7.0)</p> <p>9) 12-Month Warranty</p> <p>10) Additional Costs – Describe and reference requirement number</p>		
	<b>RELEASE 5 SUBTOTAL</b>	\$

**COST SPREADSHEET**

COMPLETE EACH DESCRIPTION AND PRICE FIELD.		STATE "NO CHARGE" IF APPLICABLE
	Product Description & Version	Total Price
<p><b><u>Release 6 Field Work, Appeals and Workflow</u></b></p> <p>Release 6 includes System Administration (Part II Technical Requirements 11.6.0 - 11.7.6).</p> <p>1) COTS Product/s Initial License Fee Through 12/31/2009 (list separately)</p> <p>2) Annual License Fee through 12/31/2009 (list separately)</p> <p>3) Annual Maintenance Fee through 12/31/2009 (list separately)</p> <p>4) Installation/Implementation/Interfacing Costs</p> <p>5) Training Costs</p> <p>6) Documentation Costs</p> <p>7) Customization/Modification Costs</p> <p>8) 12-Month Warranty</p> <p>9) Additional Costs – Describe and reference requirement number</p>		
	<b>RELEASE 6 SUBTOTAL</b>	<b>\$</b>

<p><b>5-YEAR LIFE CYCLE COST ANALYSIS TOTAL AMOUNT</b></p>	<p><b>Combined Cost of Release 1 through 6 Total</b></p>	<p><b>\$</b></p>

<b>THE FOLLOWING ITEMS ARE NOT USED IN THE LIFE CYCLE COST ANALYSIS.</b>			
<b>REFERENCE PART II REQUIRMENT NUMBER. COMPLETE EACH DESCRIPTION AND PRICE FIELD.</b>			STATE "NO CHARGE" IF APPLICABLE
	<b>Product Description &amp; Version</b>	<b>Price of Each</b>	<b>Total Price</b>
<b>ADDITIONAL FUNCTIONALITY OR FEATURES.</b>			
<b>CONSULTING HOURLY RATE FOR DIFFERENT LABOR CATAGORIES</b>		Hourly Rate	
Project Manager			
Program Manager			
Senior Developer			
Junior Developer			
System Architect			
Functional Expert			
Implementation Manager			

Signature of person authorized to provide firm cost proposal.

\_\_\_\_\_  
Vendor Name:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name and Title

## PART II – IPAS REQUIREMENTS

Any vendor submitting a proposal for this RFP must respond to all requirements. Additional information is invited, however, unnecessary presentations beyond that sufficient to present a complete and effective proposal are not desired.

Your response must describe how you will meet the requirements below. Your response should reference the entire requirement number (Sec# for section number, Sub# for subsection number and Req# for requirement number) as they are stated below. A zero (0) in the Req# column indicates comments only, no response is required.

Requirements identified with "M" are mandatory requirements and those identified with "D" are desirable. The requirements of this RFP are the minimum acceptable.

Indicate separate costs on the RFP Cost Spreadsheet located in Part I Section 6 Required Forms wherever requested. No cost information should be listed in the narrative proposal.

If vendor proposes to use subcontractors, associated companies, or consultants that will be involved in any phase of this project, vendor’s response to the requirements must include pertinent subcontractor information also.

Refer to Part I Section 2.6 Proposal Organization and Format.

Refer to the IPAS RFP Dictionary (including acronyms) in Attachment K.

Sec#	Sub#	Req#	M or D	Requirement Description
G	0	0		<p><b>General RFP Requirements</b></p> <p>The purpose of Part II General RFP Requirements is to obtain information on the vendor’s ability to perform the work outlined in this RFP. The proposer is required to demonstrate corporate experience, technical capability and financial means to support the Contract.</p>
G	0	A	M	<p><b>Minimum Experience Requirements</b></p> <p>In order for a proposal to be considered, a proposer must meet the following requirements:</p> <ol style="list-style-type: none"> <li>1. Must have been in business, existing company or as the result of a merger, for a minimum of five (5) years.</li> <li>2. Must have successful experience in designing and implementing web-based transaction systems in the past five (5) years.</li> <li>3. Must have been the primary vendor <u>and</u> the Licensor of commercial off-the-shelf software (COTS) on successfully designed and implemented property assessment and tax collection systems at least once within the past five (5) years. Vendors must have implemented a system that:                             <ul style="list-style-type: none"> <li>➤ has at least 75,000 parcels,</li> <li>➤ is scaleable to 5,000,000 parcels,</li> <li>➤ is in a multiple jurisdiction integrated database, and</li> <li>➤ has at least six (6) of the following nine (9) functionalities:                                     <ol style="list-style-type: none"> <li>1. Property valuation</li> <li>2. Assessment administration (notices, letters and reports)</li> <li>3. Data import and export</li> <li>4. Statistical analysis</li> <li>5. Data storage and retrieval e.g. sales database</li> <li>6. Workflow e.g. appeals tracking, field review and audits</li> <li>7. Query capabilities</li> <li>8. Geographic Information Systems (GIS)</li> <li>9. Digital photos and sketches</li> </ol> </li> </ul> </li> </ol>

Sec#	Sub#	Req#	M or D	Requirement Description
G	0	B	M	<p><b>Organization Capabilities</b></p> <p>The proposer must provide detailed information regarding their previous contracts to demonstrate their qualifications (work it has successfully performed) that meet the minimum experience requirements (Section G.0.A.). For each qualification include:</p> <ol style="list-style-type: none"> <li>1. dates and a brief description of the project.</li> <li>2. indicate which staff proposed for the IPAS project participated in these prior engagements and the nature of your staff's role on each engagement.</li> <li>3. project results including a description of performance vs. specified budget and timeline.</li> </ol> <p>Provide a list of all clients and organizations with whom you have completed projects similar in size and scope to this RFP, during the last five years.</p>
G	0	C	M	<p><b>Staff Qualifications</b></p> <p>Provide a list of key staff that will be assigned to this project and the role they will have. If subcontractors are proposed, list subcontractor staff also. Provide resumes describing the educational and work experiences for each of the <u>key</u> staff who would be assigned to the project.</p> <p>The proposer must designate a project leader who will be responsible for this project.</p>
G	0	D	M	<p><b>Proposer References</b></p> <p>Proposers must complete the Vendor Reference form found in Part I Section 6 Required Forms and include a list of at least five (5) clients/buyers/organizations with whom the proposer has done business within the last five (5) years. At least one (1) reference must be a project that is described in Section G.0.A.</p> <p>For each client/buyer/organization, the proposer must include the company name, address, contact person, title of contact person, project role and telephone number along with a brief description of the project or assignment, which was the basis for the business relationship.</p>
G	0	E	M	<p><b>Organizational Financial Summary</b></p> <p>Proposers must provide the most recent three (3) years of financial summary information to substantiate financial stability. Acceptable forms of information include:</p> <ul style="list-style-type: none"> <li>• Third-party audited report.</li> <li>• An annual financial report.</li> </ul> <p>The State reserves the right to request any additional information to substantiate financial stability.</p>

Sec#	Sub#	Req#	M or D	Requirement Description
G	0	F	D	<p><b>Projected IPAS Implementation Timeline</b></p> <p>IPAS will have broad scope and functionality. It is envisioned that, over time, IPAS will have the required functionality to be able to replace virtually all of the existing SLF computer systems with one integrated system. There are many factors that will affect the implementation timeline for specific functions. These include DOR staff availability (business and IT), budget, and the allocation of work between vendor(s) and DOR.</p> <p>Listed below are desired dates for the completion of specific requirements (Includes testing). Describe your plan for achieving these milestones. If you are not able to achieve the target date for any of the requirements, please list the requirement, what the issues are, and when you will be able to meet the requirement.</p> <p><b>Projected Implementation Timeline</b></p> <p><b>(Part II Requirements Section # &amp; Title)</b></p> <p><b>1.0.0 General System Requirements</b></p> <ul style="list-style-type: none"> <li>• 1.0.0 – 1.6.1 April 30, 2006 (Release 1)</li> <li>• 1.7.1 – 1.7.12 (GIS) Jan. 31, 2007 (Release 5)</li> </ul> <p><b>2.0.0 Database Design</b> April 30, 2006 (Release 1)</p> <p><b>3.0.0 Data Maintenance</b> April 30, 2006 (Release 1)</p> <p><b>4.0.0 Query, Analysis &amp; Reporting</b> April 30, 2006 (Release 1)</p> <p><b>5.0.0 Land Valuation</b> Oct. 31, 2006 (Release 4)</p> <p><b>6.0.0 Cost Method of Valuation</b> June 30, 2006 (Release 3)</p> <p><b>7.0.0 Comparable Sales Analysis and Valuation Processes</b> Oct. 31, 2006 (Release 4)</p> <p><b>8.0.0 Income Approach</b> Oct. 31, 2006 (Release 4)</p> <p><b>9.0.0 Value Reconciliation</b> Oct. 31, 2006 (Release 4)</p> <p><b>10.0.0 Sales and Ratio Studies</b></p> <ul style="list-style-type: none"> <li>• 10.0.0 – 10.2.3 May 31, 2006 (Release 2)</li> <li>• 10.3.1 – 10.4.3 Oct. 31, 2006 (Release 4)</li> </ul> <p><b>11.0.0 System Administration</b></p> <ul style="list-style-type: none"> <li>• 11.0.0 – 11.5.3 Oct. 31, 2006 (Release 4)</li> <li>• 11.6.0 – 11.7.6 March 31, 2007 (Release 6)</li> </ul> <p><b>12.0.0 System Support</b></p> <ul style="list-style-type: none"> <li>• 12.0.0 – 12.4.2 staged based on this implementation schedule</li> <li>• 12.5.0 – 12.5.3 April 30, 2006 (Release 1)</li> </ul>
				<b>End of General RFP Requirements</b>

Sec#	Sub#	Req#	M or D	Requirement Description
T	0	0		<p><b>Technical Requirements</b></p> <p>The purpose of Part II Technical Requirements is to obtain information on the vendor's ability to perform the work outlined in this RFP.</p>
0	0	0		<b>SECTION 0 OVERVIEW</b>
0	0	2	M	<p><b>Project Overview</b></p> <p>To demonstrate your firm's understanding of the entire project, provide an overview of the project (proposed project summary). Include a list of software required (including 3<sup>rd</sup> party) and a list of sub-contractors.</p>
0	0	1	D	<p><b>Additional Functionality</b></p> <p>This RFP provides a list of known requirements; however, there may be additional functionality that your system contains. Provide a list of any functionality that is not listed anywhere else in the requirements. Provide a separate cost in the RFP Cost Spreadsheet under the area identified as Additional Functionality.</p>
1	0	0		<p><b>SECTION 1 General System Requirements</b></p> <p>SLF seeks a flexible system that is consistent with modern software design that provides users with the ability to customize display and modify business rules to enhance the system without the need for source code changes. In addition, SLF seeks pre-existing software that is able to be installed and demonstrated at the time the proposal is submitted. Products and services to be purchased include: software, software modifications, consulting, and data conversion.</p> <p>The basis for the assessor's valuation of real property is found in sec. 70.32(1), Wis. Stats., "Real property shall be valued by the assessor in the manner specified in the Wisconsin Property Assessment Manual provided under sec. 73.03(2a), Wis. Stats from actual view or from the best information that the assessor can practicably obtain, at the full value which could ordinarily be obtained therefore at private sale."</p> <p>SLF requires the Wisconsin Property Assessment Manual (WPAM) Volume II for Residential and Agricultural property and the Marshall &amp; Swift Valuation Service cost system for commercial and manufacturing property.</p> <p>The goal is to maintain the State's recognized property characteristic standards and annually updated source of cost information. The language throughout this document reflects that preference. It is a preference, however, and not an absolute requirement.</p> <p>SLF has particular expectations regarding how WPAM and Marshall &amp; Swift Commercial Estimator costs would be used. The goal is to assure that: (1) a re-listing of residential property data is not necessary; and (2) certain data characteristics needed to perform current varied analyses using the cost, income and market approaches continue to exist for that purpose. See Section 6 of Part II Technical Requirements for additional cost approach discussion and criteria.</p> <p>Definitions: Audit capability is the ability to track all changes to IPAS. History capability is the ability to look at the alterations to property over time and the ability to reconstruct the view or property as of a given point in time (excluding error corrections).</p>

Sec#	Sub#	Req#	M or D	Requirement Description
1	1	0		<b>GUI</b>
1	1	1	M	The system must be a proven system already in production and in use at other locations of similar size. The system must employ a graphical user interface (GUI).  <b>Describe how you will meet this requirement.</b>
1	2	0		<b>High Integration</b>
1	2	1	M	As systems come on-line, IPAS must be highly integrated so users can move easily from one part to another and so that changes need only be made in one place. IPAS must have a uniform design, documentation style, and user interface.  IPAS must have the ability to access documents and images maintained elsewhere, e.g. the Data Management function must be able to share files and data with the Query, Analysis and Reporting functions: Statistical Analysis function must share files and data with the Manufacturing Sales Analysis and Reconciliation (SAR), photos and sketches, Tax interface functions, and other DOR tax systems (Income, Sales, and Excise Tax).  <b>Describe how you will meet this requirement.</b>
1	2	2	D	On-Line Documentation SLF prefers on-line documentation and help functions that are context-sensitive.  <b>Describe how you will meet this requirement.</b>
1	2	3	M	Modular Design IPAS design must be modular so that the various subsystems can be modified, deleted, or enhanced without affecting the rest of the system.  <b>Describe how you will meet this requirement.</b>
1	2	4	M	Reference Table Updates and Customization Many of SLF's current systems are table driven, see WPAM Vol. II, residential and agricultural valuation manual (Attachment F). These include local modifiers tables, depreciation tables, depth tables, neighborhood tables, etc. Authorized users must be able to add additional items to existing tables and change table values on-line using a built-in graphical user interface (e.g. update local modifiers annually, add building classes to base tables and change individual rates). Users must be able to make changes without modifications to the source code.  <b>Describe how you will meet this requirement.</b>
1	2	5	M	SLF requires use of a third party relational database system for storage and retrieval of information. IPAS must use a non-proprietary database, including:  1. Relational database widely used 2. Referential integrity enforcement 3. Support record locking and allow only one user to update a record at a time. 4. Provide a date/time stamp, including creates and last update.  Additional database requirements are provided in Section 3, Data Maintenance.  <b>Describe how you will meet this requirement.</b>
1	2	6	M	Programming Capabilities There must be an application programming interface (API) that allows the State's technical staffs to add functions or subroutines without modifying IPAS' source code, for example, a land abstraction or repeat sales analysis and reporting process.  The application programming interface must support a developmental language that is currently being widely used.  <b>Describe how you will meet this requirement.</b>

Sec#	Sub#	Req#	M or D	Requirement Description
1	3	0		<b>Security</b>
1	3	1	M	IPAS must provide for secure access to the system, including network address and specific use restrictions.  <b>Describe how you will meet this requirement.</b>
1	3	2	M	IPAS must indicate which of the system's security options are implemented with operating system software, DBMS software and which of these are implemented with application software and security software.  <b>Describe how you will meet this requirement.</b>
1	3	3	M	IPAS must also provide secure access to the underlying data and databases.  <b>Describe how you will meet this requirement.</b>
1	3	4	M	IPAS must be able to layer security and be able to define different accesses for different people. These functions must be user definable by systems administrative - security personnel.  This access must be definable at the following levels: <ol style="list-style-type: none"> <li>1. Menu items.</li> <li>2. Screens and functions available on a screen.</li> <li>3. Fields on a screen including limiting user ability to update or view certain fields and data records.</li> <li>4. Distinguish between internal and external users.</li> </ol> <b>Describe how you will meet this requirement.</b>
1	3	5	M	IPAS must provide a personnel table with creator name, logon ID (or other unique identifier), unit affiliation, authority level to be maintained by system administrator.  <b>Describe how you will meet this requirement.</b>
1	3	6	M	IPAS must allow dynamic update of security access through authorized users.  <b>Describe how you will meet this requirement.</b>
1	3	7	M	IPAS must allow grouping of the accesses of like users and allow for group updating of their security profiles. A single user must be able to be assigned to multiple groups at the same time.  <b>Describe how you will meet this requirement.</b>
1	3	8	M	IPAS must meet the following security criteria: <ol style="list-style-type: none"> <li>1. Must NOT display passwords during the entry process.</li> <li>2. Must NOT store passwords in any file program, command list, procedure, macro or script where it is susceptible to disclosure or use by anyone other than its owner.</li> <li>3. Must be able to record and report all security administration activity.</li> <li>4. Must log all security violations in such a way that the user cannot change them.</li> </ol> <b>Describe how you will meet this requirement.</b>

Sec#	Sub#	Req#	M or D	Requirement Description
1	3	9	M	<p>IPAS must comply with State of Wisconsin and DOR standards.</p> <ol style="list-style-type: none"> <li>Suspend user ID after three invalid attempts.</li> <li>Encrypt all passwords stored in computer files using Secure Socket Layer (SSL) security at a minimum of 128-bit encryption.</li> <li>Integrate user authentication with an external Lightweight Directory Access Protocol (LDAP) data store.</li> <li>Provide table-driven system security by functional area. LDAP architecture is the preferred mechanism for storing all security-related information.</li> <li>Allow single sign-on authentication, authorization and audit tracking for all functions within IPAS.</li> <li>Allow users to open multiple sessions at the same time with their logon ID.</li> <li>Cause user sessions to expire after a certain timeframe has elapsed (timed out) since they last actively used IPAS. The timeframe must be maintainable by system administrators.</li> <li>Provide a security schema that allows for multiple security profiles for one user – using one logon, and screen level access based on those profiles or roles.</li> <li>Note that there is a state identification password standard for external users known as the Web Access Management System (WAMS).</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
1	4	0		<b>Interfaces Within DOR</b>
1	4	1	M	<p>IPAS must interface with other DOR systems. These applications run on a variety of platforms including:</p> <ol style="list-style-type: none"> <li>MVS, JMS DB, CICS</li> <li>MVS, DB/2, CICS</li> <li>MVS, IMS DB/DC</li> <li>Unix/Sybase servers and MS Windows/PowerBuilder, Oracle</li> </ol> <p><b>Describe how data is exchanged and how you will meet this requirement.</b></p>
1	4	2	D	<p>Other Systems Interfaces IPAS should interface with other systems and external agencies. These applications run on a variety of platforms including:</p> <ol style="list-style-type: none"> <li>MS/DOS, dbase</li> <li>MS/DOS, Paradox</li> <li>Auto CAD, MapInfo, Micro-station, ESRI</li> <li>IBM S/38</li> <li>AS400</li> <li>VSE/ESA, DL1, SQL/DS, CICS</li> </ol> <p><b>Describe how data is exchanged and how you will meet this requirement.</b></p>
1	4	3	M	<p>Browser User Interface IPAS must support Microsoft Internet Explorer Release 6.0 and higher for external users. The State prefers IPAS to be “browser neutral.” IPAS must be capable of supporting browsers with 5% or more share of the US market.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	4	4	M	<p>Software Upgrade Support During the term of the Contract, COTS Products must be made compatible with new releases of associated software within 1 year of their release. This includes the RDBMS, Operating System Software, third party packages used, etc. Any cost associated with this requirement must be included in the annual license fee or license/maintenance fee.</p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet.</b> <b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
1	4	5	M	<p>Network Support IPAS must support client workstations connected to local area networks.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	4	6	M	<p>Exchange Support. The State provides interface with Microsoft Exchange and the Oracle Collaboration Suite for email notifications, i.e. it uses Simple Mail Transfer Protocol (SMTP) for sending e-mail messages between servers.</p> <p><b>Describe how you will provide this interface.</b></p>
1	4	7	M	<p>Wide Area Network Support IPAS (both clients and server) must be able to operate over a Wide Area Network.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	4	8	D	<p>Cluster Configurations</p> <p><b>Explain how your system will provide for cluster configurations with multiple physical servers.</b></p>
1	4	9	M	<p>Hardware Requirements The Vendor must list the minimum and the recommended hardware to implement its proposed software solution.</p> <p><b>Describe required hardware.</b></p>
1	4	10	M	<p>Installation of Software The Vendor must describe its plan for IPAS software installation and interfacing with existing SLF systems and include installation milestones in its overall project schedule.</p> <p><b>Describe how you will meet this requirement.</b> <b>Provide a separate cost in the RFP Cost Spreadsheet under Release 1.</b></p>
1	4	11	D	<p>Describe the open system interface strategy for sharing data.</p> <p><b>Describe:</b></p> <ol style="list-style-type: none"> <li>1. <b>How the interfaces are designed.</b></li> <li>2. <b>How the standard file formats will be communicated to the users</b></li> <li>3. <b>How interfaces will be tested</b></li> <li>4. <b>How all interface activities will be monitored</b></li> <li>5. <b>Fallback strategies in the event of interface failures</b></li> </ol>
1	4	12	M	<p>Concurrent Users and IPAS Response Time IPAS will have up to 100 concurrent users. The majority of these users will be located in six district offices through out the state. IPAS response time must be fast enough to not interrupt staff performance while completing work tasks.</p> <p><b>Describe and provide examples of how your system will meet this requirement.</b></p>
1	5	0		<b>Importing &amp; Exporting Requirements</b>

Sec#	Sub#	Req#	M or D	Requirement Description
1	5	1	M	<p>IPAS will receive data from numerous stakeholders including 1,851 local units of government, 72 counties, other State and Federal agencies (DOA, DNR, DOT, US Dept of Interior, US Dept of Agriculture) and customers, such as manufacturers.</p> <p>This data will include items such as parcel land and improvement characteristics, attributes for 3.6 million real estate parcels and over 200,000 personal property accounts, assessment rolls, legal descriptions, assessment and sales values data, and property updates. Data will be transmitted to IPAS from many different software programs on many different platforms.</p> <p>Applications will include electronic transfer, editing and use of data to populate databases, spreadsheets, e-forms and reports.</p> <p><b>Describe and provide examples of how you will provide data interface with other systems.</b></p>
1	5	2	M	<p>Data Specifications Import and Export</p> <p>The vendor must define a standard inbound and outbound interface specification that will guide the import and export of data into and from IPAS. The counties and municipalities desiring to interface their systems with IPAS will be responsible for developing programs to supply and receive the required data in the prescribed format.</p> <p>An example of current transfer specifications is the LGS Financial Report Form XML schema and Statement of Assessments (SOA) form (PA-521c) at:  <a href="http://www.dor.state.wi.us/eserv/slfeserv.html">http://www.dor.state.wi.us/eserv/slfeserv.html</a></p> <p>Vendors must include examples of their products in existing applications.</p> <p><b>Discuss the approach to be used to import a Wisconsin Property Assessment Roll, (see Attachment L for examples) and the Property Record Card specified in WPAM Vol. II (Attachment F, pages 195-197 and 326).</b></p>
1	5	3	M	<p>IPAS must support export and import in at least ASCII, XML, Excel and Access formats.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	5	4	M	<p>IPAS must have the ability to export and import data directly into and from analytical modules in IPAS and third-party statistical packages (such as SPSS (Statistical Package for the Social Sciences), NCSS (Number Cruncher Statistical System) or SAS (Statistical Analysis Software)).</p> <p><b>Describe how you will meet this requirement.</b></p>
1	6	0		<p><b>E-Filing Requirement Example</b></p> <p>IPAS is intended to accept electronic filed data from a variety of sources. A DOR e-filing approach is reflected in the current manufacturing M-form project.</p> <p>Attachment J provides documentation of this electronic filing process.</p> <p>Also see BPM, Attachment H, tab "Assess Mfg Property" for information on M-Forms</p>
1	6	1	D	<p><b>Discuss any other solutions and recommendations for data transmission to and from stakeholders provided by your system that is not listed in the requirements.</b></p>
1	7	0		<p><b>Geographic Information System (GIS) Interface and Integration</b></p>
1	7	1	M	<p>IPAS must import and integrate existing GIS data from federal, state, county, and municipal levels of government. IPAS must have the ability to import the data from multiple types of GIS software products.</p> <p><b>Describe how you will meet this requirement.</b></p> <p>All costs for the required GIS interface and integration must be explicitly segregated.</p> <p><b>Provide the cost for GIS in the RFP Cost Spreadsheet under Release 5.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
1	7	2	D	<p>IPAS should maintain the relationship between improvement accounts with no land component and the land parcel they reside on (e.g. buildings on leased land).</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	3	M	<p>GIS Access to Appraisal Database IPAS must seamlessly integrate the GIS system with the appraisal databases to display appraisal data on annotated and thematic maps. IPAS must accomplish this without copying files from one system to the other.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	4	D	<p>Applications to GIS IPAS applications should be able to invoke the GIS application by calling and passing its parameters. The two applications would appear in separate windows simultaneously on the users PC. The two applications would communicate in a seamless fashion and the means of communication would be transparent to the user.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	5	D	<p>Single Parcel IPAS applications should be able to call GIS for a particular parcel and have GIS display an annotated cadastral map of the parcel and surrounding area.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	6	D	<p>When the user selects a parcel in GIS, IPAS should pass the parcel's identifier to the valuation application, or other active application, which would then display data pictures or sketches for the property in its own window.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	7	D	<p>Set of Parcels System applications should be able to activate GIS and pass data for a set of parcels that have been queried or calculated. GIS would then display an annotated or thematic map for those parcels.</p> <p><b>Explain how your system will provide this seamless integration.</b></p>
1	7	8	D	<p>When the user draws a boundary (circle or a polygon) on a map in GIS and GIS identifies all the parcels within the boundary, the interface should pass information to the valuation application. The valuation application should process the list (e.g. select comparable properties) and display the results in its own window or pass the data for the selected parcels back to GIS for map display. IPAS should allow this GIS functionality with any application.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	9	D	<p>Area Calculations IPAS' GIS should have a seamless integration with other applications. For example, the GIS should provide area calculations (total parcel area, area by soil type, area by land use, etc.) to the valuation applications.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
1	7	10	D	<p>Parcel Maintenance</p> <p>The valuation applications and GIS should cooperate in the maintenance of parcel definitions such that their databases are always synchronized. When the valuation application user determines the need for parcel maintenance (merge, split, new parcel, etc.), IPAS should invoke GIS.</p> <p>In GIS, the user performs the parcel maintenance graphically. The interface should pass the new parcel number(s) assigned by GIS (as well as area) back to the valuation or other modules to update their database. Each application should be in sync and each would store history.</p> <p><b>Describe how you will meet this requirement.</b></p>
1	7	11	D	<p>Location Influences on Value</p> <p>IPAS should integrate the GIS and valuation applications which determine the influence of location on value and other features within the other layers of data. It should assist in gathering the data necessary to identify the location of factors that affect values, the properties affected by the factors and the distances of properties from the factors. Other layers of interest include:</p> <ol style="list-style-type: none"> <li>1. Soil map units</li> <li>2. Topography (e.g. flood plain)</li> <li>3. Infrastructure (e.g. paving, sewers, water, etc.)</li> <li>4. Land use</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
1	7	12	D	<p>Neighborhood Determination</p> <p>IPAS should integrate the GIS application and valuation application to determine boundaries of homogenous neighborhoods i.e. groups of geographically contiguous parcels with like attributes and like location influences on value or from neighborhood and neighborhood group tables in the parcel databases and analytical modules.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	0	0		<b>SECTION 2</b>
2	1	0		<b>Database Design</b>
2	1	0		<b>Data Model</b>
2	1	1	M	<p>A Data Dictionary Definitions of Fields</p> <p>There must be a data dictionary (meta data) that defines the basic organization of the database including a listing of all tables in the database, the names and types of each field, the projected volume, and the update cycle.</p> <p>For example, this dictionary will include terms used by SLF when referencing SAM, SAR, and Chapter 10 of the WPAM, Vol. I (Attachment E). This dictionary must be modifiable by users with appropriate administrative security.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	1	2	M	<p>Physical Data Model</p> <p>The vendor must supply a physical data model that diagrams the major entities (tables) and the relationships between them for their COTS Product. This must use a recognized coding convention when giving the cardinalities associated with the relationships, and for other notations.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	1	3	M	<p>The data model must include a listing of all the data elements (fields) that make up each entity. If the elements differ among installations, provide a prototype or typical set of elements.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
2	1	4	D	Provide a logical data model, if available for your COTS Product, and any information on the relationship(s) between them.  <b>Describe how you will meet this requirement.</b>
2	1	5	M	The database design must incorporate GIS, sketching and photo capabilities.  <b>Explain how your system will provide this functionality.</b>
2	2	0		<b>Data Base Management System (DBMS)</b>  SLF prefers a third party relational database system for storage and retrieval of information. See Section 1.2.5 for detailed database requirements.
2	2	1	M	The DBMS must enforce referential integrity between elements of IPAS.  <b>Describe how you will meet this requirement.</b>
2	2	2	M	The DBMS must handle full backup-recovery capabilities as required for any production, mission critical database. IPAS users must have the capability of recovering data that is removed or changed, which includes individual fields and entire records. This includes: <ul style="list-style-type: none"> <li>1. full logging of transactions</li> <li>2. full backup and recovery capabilities, automatic up-to-the minute recovery through the application of transaction logs</li> <li>3. reporting of actual or potential errors and problems</li> </ul> <b>Describe how you will meet this requirement.</b>
2	2	3	M	The DBMS and/or hardware must support some form of data mirroring or equivalent. This is to provide for high availability of IPAS.  <b>Describe how you will meet this requirement.</b>
2	2	4	M	IPAS must support multi-node application server processing such that application server processing load can be distributed, and automatically balanced, across multiple servers.  <b>Describe how you will meet this requirement.</b>
2	2	5	M	The DBMS must support Symmetric Multi-Processing (SMP).  <b>Describe how you will meet this requirement.</b>
2	3	0		<b>Property Information and Classification</b>

Sec#	Sub#	Req#	M or D	Requirement Description
2	3	1	M	<p>DOR has defined a set of requirements of how property data is grouped and related. Wisconsin Statutes define most general property as either real property (sec. 70.03, Wis. Stats.) or personal property (sec. 70.04, Wis. Stats.). There are eight classes of real property in Wisconsin. A parcel may include more than one class of property. There are four 'items', or categories, of personal property that Wisconsin assessors must aggregate separately by owner in the assessment roll. Modifications, additions to and deletions of property classes must be easy to implement by the user.</p> <p>Real Property</p> <ol style="list-style-type: none"> <li>1. Residential</li> <li>2. Commercial</li> <li>3. Manufacturing</li> <li>4. Agricultural</li> <li>5. Undeveloped</li> <li>5M. Agricultural Forest</li> <li>6. Productive Forest Land</li> <li>7. Other</li> </ol> <p>Personal Property</p> <ol style="list-style-type: none"> <li>1. Steam and other vessels</li> <li>2. Machinery, tools and patterns</li> <li>3. Furniture, fixture and equipment</li> <li>4. All other taxable personal property</li> </ol> <p>See WPAM Vol. I pages 5-37 to 5-43 for real property information and pages 15-18 to 15-39 for personal property information in Attachment E and secs. 70.29, 70.30 and 70.32(2) Wis. Stats.</p> <p><b>Indicate how your system will accommodate this real and personal property classification structure in the database design.</b></p>
2	3	2	M	<p>Residential Classification (Class 1)</p> <p>The residential class includes any parcel or part of a parcel land that is used or most likely will be used for residential development. A full definition is provided in WPAM Vol. I, page 5-39, in Attachment E.</p> <p>IPAS must be able to account for multiple improvements in a single parcel record.</p> <p>IPAS must incorporate the WPAM Vol. II (residential and agricultural costs) for valuing residential property, Attachment F. Additional cost valuation specifications are provided in Section 6 of Part II Technical Requirements.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	3	M	<p>Commercial Classification (Class 2)</p> <p>The commercial classification includes all land and improvements primarily devoted to buying and reselling goods for a profit. Multiple family parcels are defined as greater than three units. A full definition is provided in WPAM Vol. I, page 5-39, in Attachment E.</p> <p>IPAS must be able to account for multiple improvements in a single parcel record.</p> <p>SLF requires the Marshall &amp; Swift Commercial Estimator for commercial property. Additional cost valuation specifications are provided in Section 6 of Part II Technical Requirements.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
2	3	4	M	<p>Manufacturing Classification (Class 3) Manufacturing property includes all lands, building, structures and other real property used in manufacturing, assembling, processing, fabricating, making, or milling tangible personal property for profit. A full definition is provided in WPAM Vol. I, page 5-39 to 5-41, in Attachment E. Manufacturing land and improvements are assessed at full market value.</p> <p>SLF requires the Marshall &amp; Swift Commercial Estimator for manufacturing property. Additional cost valuation specifications are provided in Section 6 of Part II Technical Requirements.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	5	M	<p>Agricultural Classification (Class 4) Agricultural classification includes land devoted primarily to agricultural use. Land classified as agricultural cannot include buildings or improvements. A full definition is provided in WPAM Vol. I, page 5-41 to 5-42, in Attachment E. Agricultural land is assessed according to its agricultural use value. Annually, SLF develops agricultural use-values for each municipality on a per acre basis.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	6	M	<p>Undeveloped Classification (Class 5) Undeveloped land is bog, marsh, lowland brush, uncultivated land zoned as shore land under sec. 59.971, Wis. Stats., and shown as a wetland on a final map under sec. 23.32, Wis. Stats., or other nonproductive land not elsewhere classified. A full definition is provided in WPAM Vol. I, page 5-42, in Attachment E. Undeveloped land is assessed at 50% of its full market value adjusted by the aggregate level of assessment.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	7	M	<p>Agricultural Forest Classification (Class 5m) Agricultural forest is land that is producing or is capable of producing commercial forest products, if the land satisfies any of three specific conditions. A full definition is provided in WPAM Vol. I, page 5-42, in Attachment E. Agricultural forest land is assessed at 50% of its full market value adjusted by the aggregate level of assessment.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	8	M	<p>Productive Forest Land (Class 6) Productive forest land is land that is producing, or capable of producing commercial forest products. Forest land cannot include buildings or improvements. A full definition is provided in WPAM Vol. I, page 5-43, in Attachment E.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	9	M	<p>“Other” Classification (Class 7) “Other” property includes buildings and improvements; including any residence for the farm operator’s spouse, children, parents, or grandparents; and the land necessary for the location and convenience of those buildings and improvements. A full definition is provided in WPAM Vol. I, page 5-43, in Attachment E.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	3	10	M	<p>Exempt Property</p> <p><b>Explain how your system processes property tax exemptions.</b> Examples include: Secs. 70.11, 70.111, and 70.112 Wis. Stats. and WPAM Chapters 10 and 22 in Attachment E.</p>

Sec#	Sub#	Req#	M or D	Requirement Description
2	4	0		<p><b>Parcel Management</b> Parcel definition: A piece of land held in single ownership. Please refer to the Attachment K RFP dictionary for related definitions.</p> <p>See the valuation requirements in Part II Sections 7, 8, and 9 for additional parcel field definitions.</p>
2	4	1	M	<p>When fully implemented, IPAS must have the capability of importing parcel land and improvement characteristics and data from over 1,851 assessment jurisdictions that will include over 3.6 million real estate parcels and over 200,000 personal property accounts. Parcel identification number formats vary from jurisdiction to jurisdiction. IPAS must address this variation.</p> <p><b>Describe and provide examples of how your system will handle this volume in a phased approach.</b></p>
2	4	2	M	<p>IPAS must delineate parcel numbers, including those that are inconsistent with the state recommended system, and assign the proper county and municipal numbers and names to each parcel. The county and local government parcel number format varies from district to district. These local parcel numbers need to be maintained in IPAS.</p> <p>The state recommended parcel numbering system is based on the Rectangular Survey as outlined in WPAM, page 5-32, Attachment E. IPAS must allow users to perform queries, as outlined in Part II Section 4, on parcel number, municipal name and number, county name and number, and other user specified criteria.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	4	3	M	<p>IPAS must allow users to renumber individual real estate and/or personal property accounts, groups of accounts within a municipality, or an entire municipality.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	4	4	M	<p>IPAS must incorporate legal descriptions that will vary in format and size from external and internal data sources. Types of legal descriptions are defined in the WPAM Vol. I, beginning on page 5-7, Attachment E.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	4	5	M	<p>IPAS must incorporate the Standard System of Identifying and Coding Local Assessment Classification, which is provided in WPAM Vol. I, page A-28, in Attachment E.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	4	6	D	<p>Land parcel information, as well as the improvements on them, should have space allocated for census tract numbers and years and Federal Emergency Management Agency (FEMA) map numbers for the most current census and the next previous census.</p> <p><b>Describe how your system can provide for census tracts and years and FEMA numbers.</b></p>
2	4	7	M	<p>Ownership of an improvement may be separate from the land parcel it is on, but IPAS must have a means of tying all improvements to the appropriate land parcel, i.e. buildings on leased land assessed as personal property.</p> <p><b>Describe your system's linking method.</b></p>
2	4	8	D	<p>An improvement may have multiple addresses assigned to it, such as, the Fire Number.</p> <p><b>Describe how your system handles multiple addresses.</b></p>
2	5	0		<b>IPAS Sales Data</b>

Sec#	Sub#	Req#	M or D	Requirement Description
2	5	1	M	<p>IPAS must incorporate the data files from the Real Estate Transfer Return (RETR), the manufacturing fielded sales database, and equalization's sales analysis system (SAS and FSAS). See Attachment D.1 through D.4 for RETR information, Attachment N for DB2 table formats of manufacturing fielded sales database and Attachment M for the SAS (includes FSAS sales) database.</p> <p>The development of this file must include use and reject criteria that are specified in SLF procedures. For examples, see Attachment O, Market Data Selection Criteria (Reject Codes) for manufacturing and equalization sections.</p> <p><b>Describe how you will meet this requirement.</b> <b>Provide a separate cost in the RFP Cost Spreadsheet under Release 1.</b></p>
2	5	2	M	<p>Historic Sales File</p> <p>IPAS must provide a seamless interface for field reviewed/verified manufacturing and commercial sales base for use in the analysis and valuation modules. IPAS must incorporate a minimum of 5 years of sales data. See Data Conversion Part II Section 12. In addition, the current manufacturing sales data must be converted into an IPAS usable file. See Data Model (Attachment I) and manufacturing fielded sales DB2 table format (Attachment N).</p> <p><b>Explain how your system will interface with a sales database and incorporate a minimum of 5 years of sales data.</b></p>
2	5	3	M	<p>Real Estate Transfer Returns (RETR)</p> <p>A project is under way that is creating new RETR processes and a new database of RETR data, see Attachment D.1 through D.4. This RETR data will be routed to IPAS.</p> <p>IPAS must maintain multiple years of RETR sales data. The state averages 240,000 to 260,000 RETR sales per year with 80,000 to 95,000 sales that are usable arm's length transactions (see Attachment O for use/reject specifications). See Section 2.7. for history and audit requirement.</p> <p><b>Describe how your system will incorporate the RETR data into sales analysis and valuation modules.</b></p>
2	5	4	M	<p>IPAS must have the ability to retrieve data from the parcel file to populate the sales file. In addition, IPAS must have a seamless architecture that allows users to view sales data and parcel data simultaneously and interchangeably.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	5	5	M	<p>When generating the sales records, IPAS must include the parcel's characteristics at the time of sale. This data may be electronically or manually received.</p> <p><b>Describe how your system will generate this date specific information from external and internal sources and maintain that information in the sales records.</b></p>
2	5	6	D	<p>IPAS should have the capacity to store additional data, such as asking price, length of time on market, and other real estate transaction information.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	5	7	M	<p>IPAS must have the capability of processing multi-parcel sales that may cross jurisdictional boundaries.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	6	0		<b>Data Tables</b>
2	6	1	M	<p>Data Definitions</p> <p>IPAS must allow users to define new database tables and elements within both new and existing database tables.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
2	6	2	M	<p>IPAS must also allow for the user-defined modification of certain characteristics of existing data elements. Authorized modification must include the definition of views to join or modify the look of tables, altering the type or size of elements within redefined parameters and altering the size or precision of a numeric field.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	6	3	M	<p>Table Driven Approach IPAS must be table driven. New parcel characteristics must be defined and used without the need for system reprogramming. This usually invokes a second level of abstraction for the data definition. IPAS must have an area for the definition of the properties of all characteristics, so that users can define them within the confines of IPAS' parameters. Also see Part II Section 1 General System Requirements.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	7	0		<p><b>Parcel History and Audit Capability</b> Definitions: Audit capability is the ability to track all changes to IPAS. History capability is the ability to look at the alterations to property over time and the ability to reconstruct the view or property as of a given point in time (excluding error corrections).</p>
2	7	1	M	<p>History may use audit records to handle its required functionality, but history information alone does not give all the information required for a proper audit trail.</p> <p>IPAS must also be able to keep an audit trail of all changes to all data. This must include the change date and time and User identifiers of who made the change.</p> <p><b>Discuss your systems audit, parcel history recording, and log report processes.</b></p>
2	7	2	M	<p>IPAS must be able to produce a user defined report of changes sorted by any of the report items for any record and for any given period of time.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	7	3	M	<p>IPAS must have the ability to track former parcel numbers when changes occur due to splits and combinations.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	7	4	M	<p>Parcel History Capability IPAS must be able to display what any record looked like at any point in time.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	7	5	D	<p>IPAS should have the capability of archiving records to off-line media after they are no longer required to be available on-line. Archive data must be available upon user request.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	8	0		<p><b>Multi-year Capability</b></p>
2	8	1	M	<p>IPAS must be able to handle information for multiple valuation years without the requirement of switching files or database, i.e., multiple valuation years must be identified internal to IPAS rather than external.</p> <p><b>Describe how you will meet this requirement.</b></p>
2	9	0		<p><b>Standardized Addresses</b></p>
2	9	1	M	<p>IPAS must be able to handle multiple site addresses for any parcel and include a seamless integration with the GIS applications.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	0	0		<p><b>SECTION 3</b> <b>Data Maintenance</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
3	1	0		<b>Data Management</b>
3	1	1	D	<p>Screen Organization and Layout All screens should make good use of menus and function keys with a graphical user interface. Including:</p> <ol style="list-style-type: none"> <li>1. Present a common look and feel across all processing screens within a product.</li> <li>2. Provide common navigation and alternate keyboard functions, such as Ctrl-key alternatives, tab movement, etc.</li> <li>3. Provide minimal screen scrolling and share format-consistent profile information when changing from screen to screen.</li> <li>4. Provide consistent current record profile information from screen to screen.</li> <li>5. Provide context sensitive on-line help functions including "tool and keyboard" tips.</li> <li>6. Provide waiting indicator, such as hourglass, for actions pending and include an escape feature on all search functions.</li> <li>7. Provide for confirmation before modifying or deleting a record at point of final update.</li> <li>8. Provide for user screen printing or print-to-file on command.</li> <li>9. Provide for seamless navigation between screens.</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
3	1	2	M	<p>Data Record Retrieval/Search In the data management module, users must be able to retrieve records directly by entering one or more parcel characteristics such as:</p> <ol style="list-style-type: none"> <li>1. County/municipality codes</li> <li>2. Parcel number/tax key number (local and manufacturing numbers)</li> <li>3. Special District Numbers (e.g. Tax Increment Districts, School Districts, etc.)</li> <li>4. Real Estate Transfer Return (RETR), Document Locator Number (DLN)</li> <li>5. Street number, name, type, direction</li> <li>6. Property description (i.e. subdivision name, lot/block, section, town, range.)</li> <li>7. Owner's and/or business occupant name</li> <li>8. County Recorded Document Number</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
3	1	3	M	<p>IPAS must allow Boolean and partial string searches, display a list of multiple matches, and allow the user to select one or more.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	1	4	D	<b>Discuss the user's ability to expand or create additional selection criteria without modifying source code.</b>
3	1	5	M	<p>IPAS must provide access to photos and sketches during the data maintenance process.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	1	6	M	<p>On-line Updating IPAS must support on-line updating with appropriate audit-history capability (as mentioned in Section 2.7 of Part II) and the following features:</p> <ol style="list-style-type: none"> <li>1. Display additions, changes and re-computed values.</li> <li>2. Allow maintenance to varied files, such as current parcel, sales, valuation, and history files.</li> <li>3. Support "what-if" capabilities for recalculation of parcel values based on updates.</li> <li>4. Provide for confirmation before modifying or deleting a record at point of final update.</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
3	1	7	M	<p>On-line Updating – Parcel Splits and Combinations IPAS must be able to easily combine real property parcels or parts of parcels into one parcel or to split parcels. IPAS must be able to transfer data from one property to another for splits and combinations, (including all property records and listing data) without the need for re-entry of data.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
3	1	8	M	On-line Updating – Annexations IPAS must easily transfer annexed property to a new municipality.  <b>Describe how you will meet this requirement.</b>
3	1	9	M	IPAS must include the capability to automatically generate appropriate notifications using mail merge functions when parcel changes are made e.g. manufacturing classification change.  <b>Describe how you will meet this requirement.</b>
3	1	10	D	Data Copy Function IPAS should include a function to copy and paste within the system for data maintenance, such as the following copying examples: <ol style="list-style-type: none"> <li>1. One entire record.</li> <li>2. Multiple records.</li> <li>3. All data, images, etc. with a parcel record(s).</li> <li>4. Specified fields within a record(s)</li> <li>5. Land information.</li> <li>6. Improvement information.</li> </ol> Users should then be able to modify the copied information on-line.  <b>Describe how you will meet this requirement.</b>
3	1	11	M	Record Locking IPAS must provide multiple user access with a built-in file and record locking capability that prevents two users from simultaneously updating the same record. Additionally, IPAS must allow other users to view a record while in locked mode.  <b>Describe how you will meet this requirement.</b>
3	2	0		<b>Data Management-Field Editing</b>
3	2	1	M	Data Field Display When entering data into a field, IPAS must provide users with a set of possible options where appropriate, like pop-ups or drop-downs, that allows data to populate the field.  <b>Describe how you will meet this requirement.</b>
3	2	2	M	Validity Edits IPAS must validate keyed or imported data and reject the entry of invalid data, e.g., alphanumeric data in a numeric field.  <b>Describe and provide examples of how you will meet this requirement.</b>
3	2	3	M	Ability to Modify Validity Edits IPAS must allow authorized users to add or redefine data validation rules without modifying source code.  <b>Describe how you will meet this requirement.</b>
3	2	4	M	Range and Consistency Edits IPAS must provide reference table (user updateable) edits for inconsistent or unusual entries between fields. Examples include data outside a value range of a numeric data field or the relationship between data fields. IPAS must flag such conditions at a time of entry and/or provide a method for reporting all such occurrences for records updated after a given date.  <b>Describe how you will meet this requirement.</b>
3	2	5	M	Ability to Modify Range and Consistency Rules Authorized users must have the ability to add, change, and override data consistency rules without modifying source code.  <b>Describe how you will meet this requirement.</b>

Sec#	Sub#	Req#	M or D	Requirement Description
3	2	6	D	<p>Suppression of Edit Flag Users should be able to suppress repeated flagging of data that fail range or consistency edits once the facts are ascertained.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	2	7	D	<p>Data Entry Edits IPAS should allow authorized users to designate whether data entry will be interrupted by system edits. Edits during data entry should not halt data entry on specific parcels but should be collected in an audit file. The audit file may be printed for review of parcels and problem fields.</p> <p>IPAS would have persistence of data, save all data entered, allow users to correct mistakes, allow users to indicate stages that are final/approved, keep an audit trail of all activity, provide for archive and eventual deletion of data.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	2	8	M	<p>Data Maintenance - Edit Reports IPAS must include the ability to display and print appropriate data and parcel reports to aid in editing and verifying data. The reports must include the following:</p> <ol style="list-style-type: none"> <li>1. All data, including cost, market, and value fields.</li> <li>2. Multiple buildings and improvements located on one parcel.</li> <li>3. Images (when indicated by the user).</li> <li>4. Sketches (when indicated by the user).</li> </ol> <p><b>Describe and provide examples of how you will meet this requirement.</b></p>
3	2	9	M	<p>Property Record Reports IPAS must produce property record reports that include the parcel attributes.</p> <p><b>Explain how your system integrates the cost components and allows users to view or print this information.</b></p>
3	2	10	M	<p>Mass Update of Data IPAS must allow users to update data on a mass basis using selected parcel characteristics. For example, users must be able to apply an economic obsolescence factor to all buildings or specified type of building in a specified area or parcel range.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	3	0		<b>Computerized Sketching</b>
3	3	1	M	<p>IPAS must support computerized sketching. Sketches produced by the program must be attached to and become part of the permanent electronic file/record for the parcel/account number.</p> <p>Users must be able to copy, import, or enter sketches into IPAS either through the use of vector strings, direct input using a pointing device such as a mouse, or other electronic device.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
3	3	2	D	<p>IPAS should be able to accomplish the following:</p> <ol style="list-style-type: none"> <li>draw and edit sketches.</li> <li>copy sketches from another property and/or a standard library.</li> <li>accommodate non-right angles and curves.</li> <li>check and automatically close sketches</li> <li>display the sketch on the screen with dimensions</li> <li>calculate, store and display the labels (e.g., main living area, patio, etc.), perimeters and area by structure level (residential, agricultural, commercial or manufacturing).</li> <li>accommodate detached structures (such as a minor outside structure) on the building card with the primary building or optional separate page.</li> <li>print the image and/or export to a file.</li> </ol> <p><b>Describe and provide examples of how you will meet this requirement.</b></p>
3	3	3	D	<p>SLF currently maintains files with paper sketches for manufacturing and utility properties. These records should be converted into an electronic format. See Section 12.5 Data Conversion.</p> <p><b>Describe how your system will translate, import, and enter these files into IPAS. Provide a separate cost for 10,000 sketch conversions in the RFP Cost Spreadsheet under Release 1. See Attachment P for examples. Note that no timeline is being established for actual sketch conversions.</b></p>
3	3	4	D	<p>Delineation of Interior Areas</p> <p>IPAS should illustrate the placement of defined sections (areas) within a building at different levels including section, tenant, building, and parcel level. For example, manufacturing building areas used as production, office or warehouse. For commercial parcels, designating tenants floor space within a building.</p> <p><b>Explain how your system will delineate area.</b></p>
3	3	5	D	<p>Enhanced Sketching</p> <p>IPAS should contain enhanced sketching capabilities including the ability to:</p> <ol style="list-style-type: none"> <li>produce graphics quality output</li> <li>automatically scale sketches</li> <li>provide a seamless interface with the GIS application.</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
3	3	6	M	<p>Sketching of Multiple Buildings and Plot Plans</p> <p>IPAS must accommodate sketching lots and multiple building footprints that vary in size and shape.</p> <p><b>Describe how you will meet this requirement.</b></p>
3	3	7	M	<p>Import and Export of Sketches</p> <p>IPAS must import and export sketches to and from other external sources that will vary in format, including GIS application and maps.</p> <p><b>Describe how you will meet this requirement.</b></p>
4	0	0		<p><b>SECTION 4</b></p> <p><b>Query, Analysis &amp; Reporting</b></p> <p>The reports, queries and screens discussed in this Section are examples from the current SLF systems. These examples specify the data fields and, in some instances, the format that is required.</p>
4	1	0		<b>User queries</b>

Sec#	Sub#	Req#	M or D	Requirement Description
4	1	1	M	<p>Ad hoc Query Tools Ad hoc query capability must be built into IPAS or provided through third party query tools. Users must be able to use the data dictionary on-line in querying all IPAS databases by selecting tables and fields from lists. DOR currently uses Crystal Reports and Statistical Analysis Software (SAS) as report tools.</p> <p><b>Describe your systems query procedures, capabilities and any limitations including size.</b></p>
4	1	2	M	<p>Users must be able to select subsets of data for extraction, reporting, updating or analysis, e.g. date of sale, range of sales dates, type of property – improved or vacant, greater than xyz square feet. The query results must be returned to the screen with options to save-as file, print, and/or link the resulting data to the statistical module.</p> <p><b>Describe how you will meet this requirement including any limitations.</b></p>
4	1	3	M	<p>Multiple Data Selection Users must be able to use any combination of data in the selection criteria to produce the extracted records.</p> <p><b>Describe the scope of your system's query functions regarding multiple field and calculated variable capabilities and limits.</b></p>
4	1	4	D	<p>Archived Records and Historical Data Selection Users should be able to use archived records and historic data (as defined in Part II Section 2.7) to produce the extracted records for one or more valuation years as required.</p> <p><b>Describe how you will meet this requirement.</b></p>
4	2	0		<p><b>Reporting Capabilities - General</b> The next sections deal with reporting and ad hoc querying. Reports may be designed to provide information on single parcels, be tabular (rows &amp; columns) or summary information based on queries. Reports may include graphic and mapping objects from the parcel sketching and GIS modules.</p> <p>System (standard &amp; production) Reporting is defined as any standard (predefined) report the user can initiate in a native or pre-programmed capacity or using system templates. These can vary between single property record card printings in this Section to specialized and/or high volume reports that run very quickly, possibly in the background.</p> <p>Ad hoc Reporting is defined as user requested and developed queries and reports. This type of report may include links between multiple files, i.e. sales years, multiple counties, property types, etc. The software must accommodate multiple and sequential reporting. The process would allow the generation of multiple reports concurrently.</p>
4	2	1	M	<p>Tabulations and Statistical Functions Users must be able to perform summary tabulations and statistical calculations, such as totals, subtotals, record counts and basic summary statistics.</p> <p>Additionally, IPAS must maintain a seamless link for advanced statistical calculations. Part II Section 10, Sales and Ratio Studies, specifies the advanced statistical calculations such as frequency distributions, medians, means, standard deviations, and coefficients of dispersion and concentration that users must be able to extract to the query and report module.</p> <p><b>Describe how the query and report module maintains a seamless link to the analysis and modeling module and what tabulations and statistics are available within your report generation process.</b></p>
4	2	2	M	<p>Capturing Output IPAS must be able to redirect output of reports, screen captures, and other queries, at the user's option, to the screen, to a printer or to a file (such as Excel, Access or Word).</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
4	2	3	D	Our preference is to not have the need for a virtual user log-in for creating system reports.  <b>Describe your system (batch) reporting.</b>
4	3	0		<b>Print &amp; Display Reports</b>
4	3	1	M	Standard-Property Record Card IPAS must display, print and/or save to file property record cards that are similar to Attachment F (PA-500, pages 195-197 and 326). IPAS must accommodate multiple buildings, improvements, sketches, and photos for one parcel.  <b>Describe how you will meet this requirement.</b> <b>Provide a separate cost in the RFP Cost Spreadsheet under Release 1.</b>
4	3	2	M	Assessment Roll IPAS must display, print and/or save to file property assessment rolls that are similar to Attachment L.  <b>Describe how you will meet this requirement.</b> <b>Provide a separate cost in the RFP Cost Spreadsheet under Release 1.</b>
4	3	3	M	Standard Property Information Reports The user must be able to produce basic data listing reports for property characteristics. These must include headers and column tabulations.  <b>Discuss and provide examples of all standard reports created by the system.</b>
4	3	4	D	Standard Reports-Listed Other SLF standard reports will be included in IPAS. The following reports are included in Attachment Q as examples.  Reason for Change report SAR Logs Municipal Computer Exemption report Ratio Study Field Audit Status  <b>Describe any other advanced report capabilities not identified in prior sections.</b>
4	3	5	M	Customizing Predefined IPAS Reports IPAS must provide authorized users with the ability to develop custom reports based on "standard report templates" without the need to change source code.  <b>Describe how you will meet this requirement.</b>
4	4	0		<b>Ad hoc Reporting</b>
4	4	1	M	IPAS must allow users to create ad hoc reports.  <b>Describe how you will meet this requirement.</b>
4	5	0		<b>Reports Graphics Capabilities</b>
4	5	1	M	IPAS must be able to produce graphical output from data tables and queries. This may include scatter plots, bar charts, histograms, pie charts, stem and leaf charts and high/low close charts.  <b>Describe your systems reporting capabilities for creating charts and graphs including any advanced charting capabilities.</b>
4	5	2	M	IPAS must be able to link statistical and analytical software to other modules to provide advanced reports and graphics.  <b>Describe how you will meet this requirement.</b>
5	0	0		<b>SECTION 5 Land Valuation</b>

Sec#	Sub#	Req#	M or D	Requirement Description
5	1	0		<b>Valuations &amp; Adjustments</b>
5	1	1	M	<p>General Land Valuation IPAS must provide for the valuation of all classes of property. IPAS must provide percentage and dollar amount adjustments for site characteristics (effective depth, effective front foot, effective date and influence factor). Land values will be calibrated using system query and analytical models. The land valuation module must interface with the GIS applications and the statistical module.</p> <p>IPAS must provide models based upon land characteristics and location. Examples include neighborhood, land use code, acreage or influence factors (See Attachment F, page 326). Including: unimproved, topography, excess frontage, water frontage, size, shape, corner influence, economic mis-improvement, restrictive non-compliant, land locked, view, easements, zoning, environmental contamination and utilities.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	2	M	<p>Land Valuation Options IPAS must accommodate the valuation of land based on front footage, square footage, acreage, and site value. IPAS must accommodate valuation based upon Wisconsin land use codes, see WPAM Vol. II in Attachment F (pages 296-301). Additionally, IPAS must accommodate agricultural use value assessment and other special land assessment including Managed Forest Land (sec. 77.84 Wis. Stats.) and Forest Croplands (secs. 77.03 and 77.04 Wis. Stats.).</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	3	M	<p>Frontage and Depth Adjustments IPAS must be able to calculate equivalent front footage and standard depth adjustment tables (see WPAM Vol. II, Attachment F, pages 284-292).</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	4	M	<p>Shape Adjustments IPAS must provide for irregular shaped lots as discussed in WPAM Vol. I, see Attachment E. IPAS must interface with GIS.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	5	M	<p>Land Table Adjustments IPAS must incorporate land adjustments based upon neighborhood that interrelate with land use codes, unit values and other lot characteristics (primary, secondary, excess, or restricted use land). The user must be able to modify these neighborhood tables without changing source code.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	6	M	<p>Exempt Land IPAS must provide the capability to enter exempt lands that are specified in sec. 70.11, Wis. Stats., such as waste treatment land and government land. Exemptions may apply to part of a parcel or the entire parcel. Managed Forest Lands and Forest Croplands are locally assessed at market value, but are not included in total taxable value.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	7	M	<p>Manual Overrides IPAS must provide users with the ability to override system generated land values as a percentage or absolute value.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
5	1	8	M	<p>Review Flags IPAS must provide a mechanism for identifying (flagging) land parcels for future value review based upon infrastructure changes, exemptions or other factors.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	9	M	<p>Total Acreage Acreage and values must be totaled and displayed for each parcel when the information is available.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	1	10	M	<p>Agricultural Forest and Undeveloped Land Valuation Agricultural forest and undeveloped land are valued at fifty percent (50%) of full value according to sec. 70.32, Wis. Stats. IPAS must provide for full values, assessed values and aggregate levels of assessment.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	2	0		<b>Agricultural</b>
5	2	1	M	<p>Agricultural Use Valuation IPAS must value agricultural land as provided under sec. 70.32, Wis. Stats., and sec. Tax 18, Wis. Admin. Code. Agricultural land is assessed according to the income that could be generated from agricultural use. The agriculture use values are determined annually by SLF on a per acre basis for four types of land (tillable 1, 2 and 3 and pasture).</p> <p>In addition, the market value per acre must be determined annually to calculate penalties for changes in use.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	2	2	D	<p>Agricultural GIS Application IPAS should provide GIS integration with land classification, soil productivity and other land use characteristics.</p> <p><b>Describe how you will meet this requirement.</b></p>
5	2	3	D	<p>Agricultural Use Summary</p> <p><b>Provide a list of additional agricultural use-valuation and classification functionality provided by your system.</b></p>
6	0	0		<p><b>SECTION 6</b> <b>Cost Method of Valuation</b></p> <p>SLF's current systems incorporate the following.</p> <ul style="list-style-type: none"> <li>• Marshall &amp; Swift's Valuation Service for commercial and manufacturing costs, standards, and specifications.</li> <li>• Wisconsin Property Assessment Manual (WPAM), Vol. II (see attachment F) for residential and agricultural costs, standards, and specifications.</li> </ul> <p>IPAS must use Marshall &amp; Swift's Valuation Service for commercial and manufacturing cost valuation.</p> <p>The MicroCost (MCost) program is a computerized version of the cost tables provide in WPAM Vol. II. The program performs calculations and produces a Vol. II cost approach to value based upon the data entered by the user, Data is stored in a Microsoft Access database. SLF provides this program to municipal assessors and will continue to do so. See Attachment F and G (MCost) for detailed procedures and examples of generated reports.</p>
6	1	0		<b>Cost Approach</b>

Sec#	Sub#	Req#	M or D	Requirement Description
6	1	1	M	<p>Commercial and Manufacturing Cost Valuation</p> <p><b>If your system incorporates Marshall &amp; Swift Commercial Estimator (Version 7.0 - July 1, 2005) for commercial and manufacturing costs, standards, and specifications, explain the integration.</b></p> <p><b>If you currently use an alternative, explain this integration and explain how you would incorporate Marshall &amp; Swift Commercial Estimator in the system.</b></p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet under Release 3.</b></p>
6	1	2	M	<p>Residential and Agricultural Cost Valuation</p> <p><b>If your system incorporates the WPAM, Vol. II for residential and agricultural costs, standards, and specifications, explain the integration.</b></p> <p><b>If you currently use an alternative, explain this integration and explain how you would incorporate WPAM Vol. II in the system.</b></p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet under Release 3.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
6	1	3	M	<p><b>MCost Program</b> The existing MCost Program (Version 4.2, Attachment G) must be modified and integrated into IPAS.</p> <p>The PC based MCost program was last updated June 22, 2002 to include value table modifications in WPAM, Vol. II. The current program environment is network PC using Windows NT 4.0 and XP, Microsoft Visual Basic 6.0, Apex TrueDBGrid Pro 5.0 and TrueDBList Pro 5.0 (Visual Basic add-ins) with data and cost tables stored in an Access_97 format.</p> <p>Source code will be provided on CD (Attachment G) for review upon written request and Proprietary Acknowledgement Agreement.</p> <p>Modifications to the MCost program must include the following program changes:</p> <ol style="list-style-type: none"> <li>1. documentation of each module-object change,</li> <li>2. documentation of new database structure (Access cost components and parcel database files),</li> <li>3. documentation of application functionality,</li> <li>4. all source code and executable compiled version of application.</li> </ol> <p>Specific MCost Program changes required:</p> <ol style="list-style-type: none"> <li>1. Incorporating the MCost Program data, files and values into your system modules (administrative, valuation, queries &amp; reporting, etc.)</li> <li>2. Adding new or modifying current tables to store the value fields (cost ladder values, RCN, RCNLD, etc.) that are currently calculated and printed in the MCost Program.</li> <li>3. Modifying the current administrative "TVC Defaults" module to apply annual user changes to the "Dwelling Base Year" and the "Assessment Year" to existing MCost database parcels. Currently the program applies user changes only to newly entered parcels. These modifications must develop a 72 county table to reflect annual modifier changes.</li> <li>4. Provide for the following new parcel fields in the MCost program screens and data tables: Federal Emergency Management Agency map number (11 chr., text), Census Tract numbers and neighborhood – group number (4 chr, integer).</li> <li>5. Provide an automated costing and depreciation module for mobile homes in the MCost Program.</li> </ol> <p><b>Discuss the program modifications and the estimated cost of changes to the MCost Program.</b></p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet under Release 3.</b></p>
6	2	0		<b>Computer-Generated Property Record Cards</b>
6	2	1	M	<p>IPAS must generate a property record card including all data fields, cost elements, sketches, and photos for a parcel. See Attachment F, an example of the current property record card (PA-500). Attachment R is an example of a potential manufacturing property record card. SLF requires similar products and reports.</p> <p>See also Query-Analysis-Reporting Section 4 and Capturing Output Section 4.2.2. (options to screen, print, or file).</p> <p><b>Describe how your system will generate property record cards.</b></p> <p><b>Indicate if the reports are part of the Marshall &amp; Swift Commercial Estimator, MCost program, or system functions.</b></p>
6	2	2	M	<p>The property record card (Attachment F, page 197 and 326-328) must be incorporated into IPAS. IPAS must allow users to modify the property record card format without altering source code changes.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
6	2	3	M	IPAS must allow users to view and print multiple property record cards by parcel and record ranges, default groups (municipality, classification) and user selected criteria.  <b>Describe how you will meet this requirement.</b>
6	2	4	M	IPAS must sort property records before printing. Examples include administrative area, county, municipality, neighborhood, or other as specified by the user.  <b>Describe how you will meet this requirement.</b>
6	3	0		<b>Cost Valuation</b>
6	3	1	M	IPAS must incorporate the costs, standards, and specifications as stated in Part II Section 6. IPAS must also allow authorized users to expand and modify the cost, standards, and specifications and provide an area to document the action as discussed in Part II Section 2.2.0 Database management.  <b>Describe how you will meet this requirement.</b>
6	3	2	M	User Specified Cost Value Adjustments IPAS must provide the user with the ability to create and modify tables for additional cost value adjustments. These tables may include depreciation, functional and economic obsolescence, market adjustments, neighborhood adjustments, adjustments for other sub-strata, such as construction quality, grade, size, or other strata as specified by the user. Users must have the ability to apply these adjustments to land and/or improvements.  <b>Describe how you will meet this requirement.</b>
6	3	3	D	For manufacturing and commercial cost valuations, IPAS should allow the user to test the reasonableness of their cost estimate against actual costs for different types of standard construction. These actual construction costs should be compiled from new construction reported on Manufacturing Real Property Returns and other sources of data. The actual cost tables would provide unit cost (sq.ft.) for different construction types (masonry, pre-engineered steel), and give consideration to different attributes such as size, office %, height and wall type.  <b>Describe how you will meet this requirement.</b>
6	3	4	D	Other Cost Adjustments  <b>Explain any additional enhancements your system provides for cost adjustments on a dollar amount or percentage basis to individual or groups of properties.</b>
7	0	0		<b>SECTION 7</b> <b>Comparable Sales Analysis and Valuation Processes</b> SLF is seeking a modern and flexible system to analyze data and estimate real and personal property assessed and market values. The analysis process must include all three standard approaches to property valuation: cost, sales comparison and income. IPAS must support the analysis and estimation of all Wisconsin classes of real property. The classes include: <ul style="list-style-type: none"> <li>• Residences, Condominiums and Townhouses</li> <li>• Commercial, Including Apartments (greater than 4 units)</li> <li>• Manufacturing</li> <li>• Agricultural</li> <li>• Agricultural Forest</li> <li>• Undeveloped land</li> <li>• Forest</li> <li>• Other (agricultural improvements and site land)</li> </ul>

Sec#	Sub#	Req#	M or D	Requirement Description
7	1	0		<b>Sales Comparison Approach</b>
7	1	1	M	<p>Data Analysis and Modeling IPAS must include:</p> <ul style="list-style-type: none"> <li>• modeling and analytical capabilities and</li> <li>• the ability to export property data to a third-party statistical package such as SPSS, NCSS, or SAS.</li> </ul> <p>NOTE: The ability to import modeling results from a third-party package may be substituted for "built-in" capabilities.</p> <p>Also see Section 1.5.1, Importing and Exporting Requirements.</p> <p><b>Describe the analytical process built into the system and the import/export methods used if alternative statistical packages are substituted.</b></p>
7	1	2	M	<p>Multiple Regression Analysis and Data Modeling must be included in the analysis process. Modeling must include additive, multiplicative, and non-linear modeling methods. Modeling may include stepwise, constrained and/or ridge regression methods.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	3	M	<p>IPAS must allow users to select variables for inclusion in analyses.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	4	M	<p>IPAS must allow for data transformations, including additive, multiplication and exponentiation and the expansion of continuous variables (such as Wall type) to binary variables (Yes/No).</p> <p><b>Discuss systems transformations capabilities and any limitations on number of transformed variables allowed.</b></p>
7	1	5	M	<p>IPAS must allow for edits of variables or post-transformed variables that will exclude and list parcels from the modeling if the record fails the edit (outlier identification and exclusion).</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	6	M	<p>IPAS must allow users to specify significance or 'cut-off' levels for variables entering and exiting a model (backwards and forwards stepwise regression).</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	7	M	<p>IPAS must include statistical measures of reliability for the model, such as, the correlation matrix and 'goodness-of-fit' statistics. Measures include Coefficient of Determination (<math>R^2</math>), Coefficient of Correlation (R), standard error (SEE), Coefficient of Variation, T and F-statistics, beta coefficients.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	8	M	<p>IPAS must provide for analyzing and saving the predicted values and residuals.</p> <p><b>Discuss any standard generated residual error report and residual plot, other analytical or graphic aids created.</b></p>
7	1	9	M	<p>IPAS must be able to constrain candidate variable coefficients when developing a model.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	10	D	<p>IPAS should be able to operate in both batch and interactive modes, preferably by pointing and clicking rather than typing commands.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	1	11	D	<p>Other Modeling and Analytical Functionality</p> <p><b>Provide a list of additional modeling and analytical capabilities your system contains.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
7	1	12	D	<p>Adaptive Estimation Procedures (Feedback) SLF currently does not use adaptive estimation procedures (AEP), however, this computerized iterative, self-referential analytical process is desirable. Include comments on smoothing and damping factor specifications and standard reports created.</p> <p><b>Describe these procedures, if available, in your proposal.</b></p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet under Release 4.</b></p>
7	1	13	D	<p>Artificial Neural Networks Recent adaptations of Neural Networks are being used to calibrate real estate valuation models.</p> <p><b>Describe this capability, if available, in your proposal.</b></p> <p><b>Provide a separate cost in the RFP Cost Spreadsheet under Release 4.</b></p>
7	1	14	D	<p>Base Home Tables SLF is interested in converting MRA models to a table format in order to understand and explain real estate valuation models. Such tables show the value of the standard or base home in each neighborhood and the dollar or per square foot amounts to be added or subtracted for difference from the base home.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	0		<p><b>Comparable Sales Database, Analysis and Selection</b> The current Manufacturing (Mfg) and Utility Section system selects comparable sales for all manufacturing parcels based on variables and weights input by the user. (See the manufacturing Sales Analysis Reconciliation (SAR) reports and file definitions, Attachment S and Attachment H – Develop Manufacturing Property Assessment Data tab). IPAS must be capable of using physical, functional, and locational characteristics to select the most similar parcels from the manufacturing and commercial sales history file.</p> <p>The current SAR process allows the user to weight any of 24 data elements to select 20 comparable sales. Comparables are ranked by statistical significance. The user can select up to six sales to be adjusted. The selection process can be repeated.</p> <p>A market grid is used to adjust for differences between the subject and comparable sales. The current system calculates the default adjustments on selected attributes. The user can override the default adjustments and enter adjustments for additional attributes.</p> <p>A value reconciliation area is used to add comments on adjustments and appraiser opinions to the SAR. Comments can be included on any of the sections.</p> <p>Comparable sales give appraisers a valuable tool for evaluating and supporting market values. The current SLF system uses information from the e-filed and scanned RETRs to build a data base of sales within the State by class of property. The current annual RETR sale base contains ≈ 250,000 records.</p> <p>The current manufacturing sales base contains ≈ 1,500 field verified sales. The Equalization (Eq) section identifies ≈ 90,000 usable arm's length sales transactions each year for use in establishing equalized value. IPAS must be able to combine current sales with archived data, when necessary, for statistical analysis and modeling.</p> <p>In the future, property characteristics will be added as information is collected from local officials, real estate entities, etc. The IPAS database will be populated by all real estate transfers recorded. It is estimated that SLF will obtain local parcel data on sixty percent of the usable sales.</p>

Sec#	Sub#	Req#	M or D	Requirement Description
7	2	1	M	<p>IPAS must store up to eight years worth of real estate transfers along with parcel data on the useable sales obtained from local officials.</p> <p>IPAS must allow the user to flag manufacturing and commercial sales older than 8 years to be maintained in the sales database as long as desired. Manufacturing also requires a method of storing data from out-of-state sales into the sales database. Out-of-state sales must be accessible to the comparable sales retrieval program.</p> <p>IPAS must allow the user to key data for sales not currently included in the sales database into the comparable sales approach grid.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	2	M	<p>Comparable Sales Retrieval Program</p> <p>IPAS must provide a comparable sales process for determining market value. This must include displaying the subject property and system selected comparables. Currently, the manufacturing assessment system (SAR) selects comparables through the use of an algorithm that computes a distance metric based on comparing the characteristics of the sales parcels with those of the subject parcels. Those parcels with the lowest distance metric are selected.</p> <p>Users must be able to specify the following:</p> <ul style="list-style-type: none"> <li>• The variables used to define comparability</li> <li>• The relative weight given to each variable</li> <li>• The search area (e.g., neighborhoods included in the search).</li> </ul> <p><b>Describe how you will meet this requirement.</b></p>
7	2	3	M	<p>Standard real estate methods typically use the Minkowski Metric, Euclidean Distance Metric, combination or variation to determine the most similar sales parcels. The current Manufacturing SAR system uses a weighted Euclidean Distance Metric.</p> <p><b>Describe the methods, means and weighting system and variables used in selecting the most comparable sales for a subject parcel.</b></p>
7	2	4	M	<p>The user must have the ability to select individual sales from the list of comparable sales for inclusion in the sales analysis. IPAS must also allow for the selection of out-of-state sales and the input of sales data not currently included in the sales database (see Section 7.2.1).</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	5	D	<p>Improved and Vacant Comparable Selection Process</p> <p>The comparable selection process should be available for both vacant and improved property.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	6	M	<p>Sales Comparison Approach Calculations</p> <p>For select property attributes IPAS must calculate a default adjustment between the subject and each selected comparable. The user must maintain an option to override any default adjustment and add additional property attributes to the grid for manual adjustment.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
7	2	7	M	<p>Comparable Sales Valuation Algorithm</p> <p>In addition to identifying the most comparable sales, IPAS must adjust them to the subject parcel, just as in a single-property appraisal. Adjustments must be based on market model adjustment tables or formulas.</p> <p>IPAS must allow the user to define, by model, the intermediate value estimates to be included in the final value algorithm, including, but not limited to, the adjusted selling prices of each of the comparables, the Multiple Regression Analysis (MRA), the cost approach estimate, and the previous appraised value of the parcel trended for time.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	8	M	<p>Comparable Sales Fields</p> <p>IPAS must provide fields for storing and relating the parcel numbers, comparable sales prices, and distance measures for at least three (3) sales per parcel, preferably six (6) sales per parcel. These fields will be populated by a comparable sales program. Appraisers may enter data in these fields as an override to the system generated data.</p> <p><b>Describe how you will meet this requirement.</b></p>
7	2	9	D	<p>IPAS should have a "review mode" for the comparable sales analysis. The review mode, or "what-if" alternative analysis, allows the user to:</p> <ul style="list-style-type: none"> <li>open an existing comparable sales analysis in "review mode"</li> <li>change the selected comparables or individual property attribute adjustments</li> <li>save the modified comparable sales analysis without over-writing the original analysis</li> </ul> <p><b>Describe how you will meet this requirement.</b></p>
7	2	10	M	<p>IPAS must generate sales comparison reports that are printable and viewable on screen. The report must show the calculations that support the estimated market value. The report must list the subject and the selected comparable sales including sale dates, sales prices, property characteristics and corresponding adjustments, adjusted sales prices and distance metrics. Any characteristics adjusted must be displayed on the grid in both percentage and dollar amounts. All adjustments must be additive.</p> <p>Suggested enhancements and alternatives to the current SAR report may be submitted. See Attachment S, SAR related information.</p> <p><b>Describe any standard system created reports used to document the comparable selection and reconciliation process.</b></p>
7	2	11	M	<p>IPAS must have the ability to automatically store and retrieve all of the information from prior comparable sales analyses on the property.</p> <p><b>Describe your systems abilities to retrieve and display prior year and history for a parcel.</b></p>
7	2	12	M	<p>The Comparable Sales module must exchange data from multiple sources, i.e cost module (Marshall &amp; Swift Commercial Estimator, WPAM Vol. II for residential and agricultural), Income Module, Assessment and Tax Roll Module, Archived data and Sales database.</p> <p><b>Describe your system's capabilities and any limitations in exchanging data with similar files and programs.</b></p>
7	2	13	D	<p>Handling Multi-Use Parcels</p> <p>IPAS should be able to apply the comparable sales approach to a single unit on a multi-unit parcel, i.e., residential use on a combination commercial-residential parcel.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
8	0	0		<p><b>SECTION 8</b></p> <p><b>Income Approach</b></p> <p>The income approach will be the primary approach in the appraisal of income-producing properties.</p>
8	1	0		<p><b>Income Valuation Process</b></p>
8	1	1	M	<p>IPAS must adhere to the industry (International Association Assessing Officers (IAAO), Uniform Standards of Professional Appraisal Practices (USPAP)) standards for the income approach to value.</p> <p><b>Describe how you will meet this requirement.</b></p>
8	1	2	M	<p>Income Valuation Process</p> <p>IPAS must have a facility for querying and selection of the parcels to be valued by occupancy code, municipality, market area or all of the above, presenting the user with a list for valuation.</p> <p>Miscellaneous Income (MI) could be entered either as a percentage of Potential Gross Income (PGI) or as whole dollar amount.</p> <p>Effective Gross Income (EGI) could either be calculated from rents entered, vacancy and collection applied and MI added or from simply entering a whole dollar amount.</p> <p>IPAS must be capable of applying model parameters to individual parcels. IPAS must provide for user choice of income and expense characteristics, such as actual expenses, expenses per square foot, percent of EGI or total detailed expenses.</p> <p>The user must have the availability of several manual entry fields with which to adjust the value indicated by the Income Approach. A table of labels of short definitions for possible adjustments would appear on a drop down menu for selection. Then a dollar amount would be entered in an adjoining field, which is either added or subtracted from the value indicated.</p> <p><b>Describe how you will meet this requirement.</b></p>
8	1	3	M	<p>Use of Actual Rents and Expenses</p> <p>Rents and expenses used in the income approach will usually be based on the model-defined parameters. However, SLF also requires the ability to use actual figures obtained from the taxpayer.</p> <p><b>Describe how you will meet this requirement.</b></p>
8	1	4	D	<p>Tracking of Income and Expense Survey Forms</p> <p>IPAS should have a facility for tracking income and expense survey forms, including date issued, date returned, type of information returned, etc.</p> <p>IPAS should be able to identify parcels for which forms have not been returned, so users can track results by property type or other criteria and generate new forms as required.</p> <p><b>Describe how you will meet this requirement.</b></p>
8	1	5	M	<p>Override Capabilities</p> <p>Users must have the ability to override the model-defined (market) income, expense, capitalization rates, etc., to recognize unique features or conditions. Users must be able to override these parameters directly (e.g., change the expense ratio).</p> <p><b>Describe how you will meet this requirement.</b></p>
8	1	6	M	<p>Gross Rent Multiplier and Rates</p> <p>IPAS must have the capability of building and maintaining tables of rents, multiplier factors and/or rates by neighborhood or type of property for use in applying the gross rent multiplier valuation method or overall rate calculation. These tables must be user modifiable.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
8	1	7	M	<p>Summary Values for Single Parcels with Multiple Buildings and Leases</p> <p>Commercial properties often have multiple building records, leases, and occupancy codes, which requires the ability to summarize the data by parcel.</p> <p><b>Describe how you will meet this requirement.</b></p>
8	2	0		<b>Single-Property Appraisal Techniques</b>
8	2	1	M	<p>IPAS must have the capability for the user to enter the necessary data for the computer to calculate a preliminary value using the following methods:</p> <ol style="list-style-type: none"> <li>1. discounted cash flow analysis</li> <li>2. mortgage-equity analysis</li> <li>3. the residual capitalization techniques</li> <li>4. band of investment.</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
9	0	0		<b>SECTION 9</b>
9	1	0		<b>Value Reconciliation</b>
9	1	0		<b>Valuation</b>
9	1	1	M	<p>IPAS must provide a mechanism to consolidate the information and value indications generated from the cost, income, and sales comparison approaches. The indicated values may be consolidated for contiguous parcels under the same ownership.</p> <p>IPAS must provide fields to store summary parcel information for review, including previous years' value and a trend value. Users must have the ability to reconcile the applicable value indications into a single indicator of value or assign an override value.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	1	2	M	<p>Valuation Allocation Process</p> <p>For contiguous parcels valued as a single parcel, IPAS must allow the user to allocate an estimated value to each separate parcel. The value allocated to each individual parcel must be recognized as the assessed value. See combined SAR report, Attachment S.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	1	3	M	<p>Recording Value Changes and Reasons for Change</p> <p>Changes in value must be identified for each parcel on an annual basis along with a reason for change code (see Attachment T and Attachment H - Assess Manufacturing Property Tab). A summary report on parcel value changes must be available.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	1	4	M	<p>Value Override Codes</p> <p>Users must have the ability to override land, building, and total values and IPAS must provide for codes indicating the reason for the overrides. Users must be able to modify or add new codes to the table as necessary.</p> <p>IPAS must provide a comment field for users to explain codes or to provide additional information. IPAS must recognize the override value as the final value.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	1	5	M	<p>Management Review</p> <p>IPAS must provide comparison of current parcel valuation to prior year's value for management review. IPAS must automatically identify parcels exceeding user's specified percentage change.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
9	2	0		<b>Value Application Reports</b>
9	2	1	M	<p>Users must be able to generate the following basic value application reports by parcel.</p> <ol style="list-style-type: none"> <li>1. Residential</li> <li>2. Commercial (including apartments)</li> <li>3. Manufacturing</li> <li>4. Agricultural</li> </ol> <p>Users must also be able to specify selection criteria, parcel ranges and modify the standard report. See Section 4 Query, Analysis &amp; Reporting for addition discussion of selection by class, location and parcel characteristics.</p> <p><b>Explain your system's ability for basic valuation reporting. Provide existing examples.</b></p>
9	2	2	M	<p>Basic Value Summary Report</p> <p>IPAS must provide basic value summary reports for each categorical variable selected by the user for multiple records/ parcels. Selection criteria such as all parcels by property classification, tax district, grade, neighborhood. Selection criteria can also include stratification by continuous variables such as sales price, valuation, age, size, etc. Selection criteria can also include override reason codes, missing/invalid data and error or warning indicators.</p> <p>The report must contain summary and analytical totals for appropriate characteristics, i.e. square foot of living area, average value per square foot, age, number of bathrooms, number of parcels, total value, (or other appropriate unit of comparison). Analytical totals are general descriptive statistics including totals, mean, median, coefficient of dispersion, etc.</p> <p><b>Describe how you will meet this requirement and provide examples.</b></p>
9	2	3	M	<p>Error and Warning Report Codes</p> <p>IPAS must allow users to define error and warning report codes. Codes could include extreme, unusual, or inconsistent data contained on a parcel. For example, single-family residences with less than 500 square feet, or manufacturing building priced per square foot exceeding specified limits e.g. 250,000+ sf manufacturing building valued over \$30/sf.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	2	4	D	<p>User-Updateable Errors and Warning Messages</p> <p>Users should be able to update the warning messages without source code changes.</p> <p><b>Describe how you will meet this requirement.</b></p>
9	2	5	M	<p>Mass Updating by Reason Codes</p> <p>IPAS must allow users to perform mass valuation and reason code updates based upon selected specifications. IPAS must also provide parcel change information in a report format.</p> <p>As an example, brick ranches code #1, are given a mass appraisal increase of five percent based upon market analysis. The reason code would indicate market adjustment except for those parcels with override values.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
10	0	0		<p><b>SECTION 10</b></p> <p><b>Sales and Ratio Studies</b></p> <p>SLF administers the RETR form. The RETR is used when the transfer of real estate occurs. Users include the counties, private sellers of real estate, and businesses that work with real estate such as title companies. The RETR is completed by grantor and grantee, recorded with the County Register of Deeds and filed with SLF.</p> <p>Electronic filing of this form will begin in late 2005. SLF receives 250,000 RETRs annually. We anticipate retaining eight years of active sales data. See RETR form in Attachment H, Business Process Model, Develop Equalized Values tab.</p> <p>Documentation in Attachment D describes the current system and electronic files to be generated. IPAS must integrate the RETR electronic data into the valuation and analysis modules. The electronic data received will be the basis for the IPAS sales data base.</p>
10	1	0		<b>Sales</b>
10	1	1	M	<p>IPAS must be capable of accepting, storing and using RETR data that is filed electronically. The electronic RETR process is outlined at <a href="http://www.dor.state.wi.us/eretr/index.html">http://www.dor.state.wi.us/eretr/index.html</a></p> <p><b>Describe how you will meet this requirement.</b></p>
10	1	2	M	<p>IPAS must have the ability to incorporate sales validation codes and adjustments for sales analysis support.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	1	3	M	<p>Sale Validation Codes</p> <p>IPAS must incorporate sales validation codes. These codes identify sales that meet validity indicators criteria based upon arm's length transactions. The codes should be consistent with professional standards, particularly the IAAO Standard on Ratio Studies and the SLF use/reject criteria list (Attachments O and U). Users must be able to modify or add new codes as necessary.</p> <p><b>Describe how your program will allow users to modify and/or add new codes.</b></p>
10	1	4	M	<p>Sales Date and Comments</p> <p>IPAS must provide a comment field for users to explain other codes or supply supplemental information. The sales database should interface with assessment data, photos, sketches and GIS. All parcel information must be sensitive to the sales date.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	1	5	M	<p>Multiple Parcel Sales</p> <p>IPAS must have the capability of tracking information on sales involving multiple parcels. This would include appropriate links and/or reference to a common sales questionnaire number. IPAS must, for the purposes of sales analysis, be able to combine the appraised or assessed values and characteristics of all parcels involved with the single sale price.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	2	0		<b>Adjustments</b>
10	2	1	M	<p>Personal Property and Financing Adjustments</p> <p>IPAS must accommodate financing, personal property and other RETR defined adjustments. Amounts entered in these fields should be added or subtracted in determining adjusted sales prices.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
10	2	2	M	<p>Time-Adjustment Factor Table IPAS must provide a process for adjusting sales price for time trends. The time adjustment process must include user specified criteria such as months, years, property classification, neighborhoods, and other property characteristics.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	2	3	M	<p>Adjusted Sales Prices IPAS must provide for adjusted sales prices in addition to original sales price.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	3	0		<b>Ratios</b>
10	3	1	M	<p>Sales Ratio Program PAS must provide sales ratio capabilities. IPAS must provide a seamless integration between the sales ratio module and the sales data base that is transparent to the user.</p> <p>Sales ratio statistics may be an integrated module or part of the value summary reports. IPAS must provide a sales-ratio program that incorporates traditional sales ratio statistics by strata. Statistics reported must include the:</p> <ol style="list-style-type: none"> <li>1. Delineation by Town, Village, City, County and Administrative Area</li> <li>2. Number of sales in the applicable time period</li> <li>3. Number of valid or usable sales</li> <li>4. Property classification</li> <li>5. Median, mean, and weighted mean</li> <li>6. Coefficient of dispersion (COD)</li> <li>7. Coefficient of concentration (COC)</li> <li>8. Price-related differential (PRD)</li> </ol> <p>IPAS must also provide processes for establishing confidence intervals about the median ratio, PRD and COD and a method of determining/eliminating statistical outliers. SLF procedures substitute statistically sampled properties with properties that have sold.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	3	2	M	<p>Ratio Study Standards All statistics must comply with IAAO Standard on Ratio Studies and SLF procedures. Users should be able to specify the following:</p> <ol style="list-style-type: none"> <li>1. Property strata to be studied (e.g., county, municipality, use codes, neighborhoods and valuation stratification)</li> <li>2. Assessment year to be studied</li> <li>3. Sale date range to be studied (single or multiple sales years)</li> <li>4. Low and high sales price and sales ratio to be included</li> <li>5. Whether to use actual or adjusted sales</li> <li>6. Assessed/appraisal estimate to be used (assessment, market or analytical value, etc.).</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
10	3	3	M	<p>Sales Ratio Detail Report IPAS must provide reports listing all sales used in sales ratio calculations including summary statistics. Users should be able to specify the sort and break sequence and select or modify the variables shown in the reports. The reports must include graphic capabilities.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	4	0		<b>Other Sales Tracking &amp; Enhancements</b>

Sec#	Sub#	Req#	M or D	Requirement Description
10	4	1	D	<p>Asking Prices and Supplemental Information The sales file should provide for asking price and listing data, including such things as the days on the market. Other information obtained from the sales questionnaire should be included in a comments field.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	4	2	D	<p>Sales Tracking Sales questionnaires are used by SLF to determine validity of sales and to obtain additional information. IPAS should provide an automatic merge to the questionnaire filing and allow tracking, receipt and process of questionnaire data.</p> <p><b>Describe how you will meet this requirement.</b></p>
10	4	3	D	<p>Sales Ratio Program Enhancements</p> <p><b>Explain any additional enhancements or features your system contains in this area.</b></p>
11	0	0		<p><b>SECTION 11</b> <b>System Administration</b> SLF currently provides notification rolls, assessment notices, full value rolls, and equated rolls for each municipality with manufacturing assessed property. Information on all manufacturing real estate and personal property accounts is currently maintained in the Statewide Assessment of Manufacturing (SAM) system. The system has approximately 11,000 personal property accounts and 12,000 real property parcels.</p> <p>Equated rolls are the assessment rolls prepared by the Manufacturing &amp; Utility Section at market value adjusted to the assessment level of the municipality. The equated rolls are then provided to the local municipalities. The property tax billing and collection process is the responsibility of the local municipalities and each county.</p> <p>SLF issues and collects penalties for late-filed forms.</p>
11	1	0		<b>Assessment Rolls</b>
11	1	1	M	<p><b>Assessment Roll and Notice Production</b> IPAS must compile the total assessed values for manufacturing and Telco property, computer exemption values, produce assessment rolls and assessment and penalty notices in specific formats described by the SLF, Attachment L (Assessment Roll-Equated PA-539-2).</p> <p>IPAS must provide several standard electronic interfaces for exchanging data with the 72 counties' and municipalities' tax roll systems and perform various administrative functions. IPAS must have a seamless integration between the valuation modules and administration module. See also export requirements in Section 1.5.1.</p> <p><b>Describe how your system integrates data to produce the assessment rolls and assessment and penalty notices.</b></p> <p><b>Describe how your system electronically transfers rolls.</b></p>
11	1	2	D	<p>Public Records SLF is required to provide public records. These records include assessment information created during the manufacturing and Telco processes. These records include but are not limited to tax roll information including the owners name(s), name of taxable party(s), mailing address, property description for the parcel, assessment classification, and assessed value.</p> <p><b>Describe how you will meet this requirement.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
11	1	3	M	<p>Past Assessment Rolls The past assessment roll is the roll that is closed before the current assessment roll.</p> <p>Notification assessment roll The notification assessment roll is the most recently closed roll. It is closed before the start of the calendar year it applies and generally corresponds to the current calendar year.</p> <p>Maintenance roll The maintenance roll is the roll currently being prepared. It generally corresponds to the next calendar year. When closed, it becomes the current assessment roll.</p> <p>Current assessment roll The current assessment roll is the assessment roll for a municipality at market value as of January 1, which includes revisions from appeals and other adjustments.</p> <p>Equated roll The equated roll is the current assessment roll at the level of assessment of the local municipality. This is the roll that is provided to the local municipality and county.</p> <p><b>Describe how your system manages assessment rolls.</b></p>
11	1	4	D	<p>Municipal Assessment Roll The municipal roll (Attachment L, PA-6392) is the current assessment roll at the level of assessment of the local jurisdiction. IPAS should electronically accept municipal assessment roll data from the 72 counties in varied formats.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	1	5	M	<p>Closing the Working Assessment Rolls IPAS must allow authorized users to close individual rolls by restricting updates to the data underlying the current roll to certain types of updates and reasons for updates.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	1	6	M	<p>Updating Closed Rolls Updates to closed rolls by authorized users must provide full identification of changes and include audit and review capabilities.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	2	0		<b>Annual Assessment Notices</b>
11	2	1	M	<p>IPAS must print selected data for all manufacturing properties in user determined formats. Notices may include late filing penalties and dooamage assessments. The printing of notices and assessment rolls involves 12,000 real estate parcels and 11,000 personal property accounts.</p> <p>The printing of Telco assessment rolls, assessment notices and tax bills follows a similar procedure. Telco assessments are processed separately from manufacturing and at a different time of the year.</p> <p>See Attachment X, Assessment Notice examples.</p> <p><b>Describe how your system processes this volume of printing. Also indicate alternatives available.</b></p> <p><b>Describe your system's assessment notice process and any electronic distribution options.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
11	3	0		<b>State Telecommunication (Telco) Assessment and Taxation</b>
11	3	1	M	<p>SLF also generates separate assessment rolls, assessment notices and tax bills for all Telco real estate and personal property in the state. The Telco mainframe program currently holds all Telco company and account information. This mainframe program maintains the records of approximately 250 Telco companies.</p> <p>For 2005, Telco filing for outside plant and personal property has been consolidated into one statewide return for each Telco with the resulting assessment value allocated to the municipalities for property tax calculation at the local rate. Each Telco receives one tax statement from the State. 250 Telco Personal Property (T-P) returns filed in 2005 will result in approximately 5,100 separate assessments through an allocation process. For 2005, there are approximately 1,700 Telco Real Estate (T-R) accounts.</p> <p>IPAS must provide for the billing and collection of the state Telco tax.</p> <p><b>Describe how you will meet this requirement. Provide a separate cost in the RFP Cost Spreadsheet under Release 4.</b></p>
11	4	0		<b>Assessment Roll Archive &amp; Notices</b>
11	4	1	M	<p>Supplementary Notices IPAS must allow users to generate supplementary notices for selected parcels.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	4	2	M	<p>Assessment Roll Archive IPAS must maintain eight years of annual assessment rolls as they appear at the time of closing.</p> <p><b>Describe your system's archive, backup and integration process.</b></p>
11	4	3	M	<p>Assessment Roll Inquiry IPAS must provide an inquiry capability that can display final value or the roll as it appears at the time it was closed (i.e. without any revisions that occurred after it was closed.)</p> <p><b>Describe how you will meet this requirement.</b></p>
11	4	4	M	<p>IPAS must automatically generate transactions of user selected changes to the maintenance roll. When change transactions are generated, change reasons need to be identified. Examples of change codes include new construction, reappraisal, etc. See change codes, Attachment T, PA-531.</p> <p>IPAS must also provide a mechanism to re-calculate the assessed values which may transcend reassessment cycles.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	5	0		<b>Assessment Maintenance</b>
11	5	1	M	<p>Assessment Roll Data Maintenance For each change made to the assessment databases:</p> <ol style="list-style-type: none"> <li>1. The person who made the change.</li> <li>2. The date the change is entered.</li> <li>3. The reason for the change.</li> <li>4. The effective date of the change. (past or future)</li> </ol> <p><b>Describe how you will meet this requirement.</b></p>
11	5	2	M	<p>IPAS must be able to handle retroactive, overlapping and out of sequence (chronologically) changes to produce desired results with minimal user intervention.</p> <p><b>Describe your system's batch and automatic update process.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
11	5	3	D	<p>Public Access Direct public access may be provided in the future. The information should include all IPAS reports in a web based format. Access to the background data should be available as a downloadable file. IPAS should allow varied levels of access. Note that there is a state identification password standard for external users known as the Web Access Management System (WAMS).</p> <p><b>Describe all public access features of your system.</b></p>
11	6	0		<p><b>Inspection Management – Field Work Planning and Status Reporting</b> IPAS must maintain inspection scheduling and status information for each manufacturing real estate and personal property account, field review and sales fielding process.</p>
11	6	1	M	<p>Appraiser Portfolios IPAS must allow portfolios of properties, municipalities or other tasks (sales or appraisals) to be assigned to appraisers based on user defined criteria.</p> <p><b>Describe your system's capabilities for scheduling and monitoring staff assignments.</b></p>
11	6	2	M	<p>Schedule Inspections and Field Reviews IPAS must schedule inspections and field reviews by:</p> <ol style="list-style-type: none"> <li>1. assigning an appraiser to conduct the inspection. This assignment could be based on the appraiser portfolios.</li> <li>2. grouping inspections by geographic area and appraiser</li> <li>3. generating notice of inspection letters</li> <li>4. assigning a deadline</li> </ol> <p>IPAS must allow each of these items to be overridden by an authorized user.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	6	3	M	<p>Queuing Field Reviews and Inspections The inspection-tracking component must automatically queue properties for inspection based on transactions that are generated automatically by other parts of IPAS (e.g. real estate sales).</p> <p>IPAS must allow the user to specify frequency of inspection to ensure that all properties are inspected on a regular basis (e.g. five-year audit cycle). IPAS must also allow inspection requests to be entered manually.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	6	4	M	<p>Track Inspection and Field Review Status IPAS must track and report the status of inspections and reviews. IPAS should update the status of the field audit to indicate that it has been completed. Including:</p> <ol style="list-style-type: none"> <li>1. Date and time of inspection</li> <li>2. Appraiser's name</li> <li>3. Reason for inspection (scheduled field audit, sale, appeal, etc.)</li> <li>4. Inspection of interior and/or exterior.</li> <li>5. Interview conducted and with whom.</li> </ol> <p>IPAS must be able to store information for multiple inspections per property.</p> <p><b>Describe how you will meet this requirement.</b></p>
11	6	5	D	<p>Workflow Management and Scheduling It is desirable that the scheduling component interface with a third party workflow management system.</p> <p><b>Describe your approach to managing workflow and scheduling. Indicate how your system links to calendar or scheduling software such as Microsoft Outlook or Project.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
11	6	6	D	Data Collection Devices SLF is interested in alternate data collection and/or data entry methods and devices, including hand-held data collection devices and machine readable data collection cards.  <b>Describe how you will meet this data collection standard and any strategies for implementation.</b>
11	7	0		<b>Appeals Notice &amp; Process</b>
11	7	1	M	Scheduling of Appeals To provide an efficient method for dealing with taxpayer appeals, IPAS must be able to track and schedule all steps in the appeal process. The user must have the capability of manually entering or modifying a schedule.  <b>Describe the system's capabilities to schedule and monitor an appeals process and identify calendar deadlines and required target dates.</b>
11	7	2	M	Appeals Notice IPAS must generate notices (letter or postcard) to property owners.  <b>Describe your system's mail merge and notification capabilities as related to the appeal process.</b>
11	7	3	M	Appeals Status IPAS must be able to generate user defined status reports for each property under appeal, by appraiser, administrative district, appellate level etc.  <b>Describe how you will meet this requirement.</b>
11	7	4	M	Appeal Values Additional fields must be provided for value changes at the Board of Assessors, the Tax Appeals Commission and by a court determination. A reason code will specify which of these values to use for tax purposes.  <b>Describe how you will meet this requirement.</b>
11	7	5	D	Manufacturing Appeal Briefs IPAS should automate the preparation of the briefs that are used in defending the appraisal of manufacturing properties for BOA hearing. The user should be able to vary the content and format of the brief. The brief should contain: 1. general property description – owner information 2. appellant information and the scheduled hearing date/time 3. land description 4. building(s) description 5. summary of valuation calculations (income or cost) 6. description of comparable properties  <b>Describe your system's ability to prepare appeal briefs.</b>
11	7	6	D	Other Work Flow and Appeal Scheduling Functionality  <b>Describe any other system capabilities or advantages.</b>
12	0	0		<b>SECTION 12</b> <b>System Support</b> The selected vendor must supply an electronic copy of all final documentation deliverables with written permission for unlimited reproduction for internal use by SLF, counties and municipalities. SLF prefers documentation in Microsoft Word or Adobe PDF. Documentation and training should be staged based on the Implementation Timeline.
12	1	0		<b>Documentation</b>

Sec#	Sub#	Req#	M or D	Requirement Description
12	1	1	M	<p>All User (Business) Documentation must include appropriate reference guides and manuals on IPAS, references to forms, notices and reports underlying use of IPAS, a comprehensive online help facility, and Quick Reference Guides by job function. Documentation must be sufficient for training SLF to use IPAS effectively and to support the system.</p> <p><b>Provide samples of documentation from previous engagements.</b></p> <p><b>Describe how you will meet this requirement.</b></p>
12	1	2	D	<p>SLF prefers all IPAS documentation be available through an on-line help facility. This capacity should be integrated in the windows and graphic user interface.</p> <p><b>Describe your help facility.</b></p>
12	2	0		<b>Manuals</b>
12	2	1	M	<p>Basic User Manual The Vendor must provide a user manual (or section of a manual) that explains day-to-day use of IPAS. The manual should include items such as adding, deleting, and updating of records. The manual should address parcel, building, sales, income and expense, and other data maintained in the data management system. The manual must be clear, accurate, and illustrate properly completed data entry screens.</p> <p><b>Describe the contents and structure of your proposed manual.</b> <b>Provide samples from previous engagements.</b></p>
12	2	2	M	<p>Procedural Manual The Vendor must provide a manual (or section of a manual) that explains the functions, maintenance and calibration of each table. This must include cost model, income parameter and market model tables and comparable sales selection and sales ratio parameters, etc.</p> <p>The manual must indicate each table's role and function, the meaning or purpose of the various table items, and how to update or modify the table entries. The impact or effect of updates must be indicated, including what data or other table values (if any) will be affected and when the change is effective.</p> <p><b>Describe the contents and structure of your proposed manual.</b> <b>Provide samples from previous engagements.</b></p>
12	2	3	M	<p>Report Manual The Vendor must provide a manual (or section of a manual) that explains how to use the query, analysis and reporting capability (Section 4). It must list standard reports and describe how to produce or modify them. The manual must describe the basic steps in producing or modifying ad-hoc or customized reports using query tools.</p> <p><b>Describe the contents and structure of your proposed manual.</b> <b>Provide samples from previous engagements.</b></p>
12	2	4	M	<p>Systems and Operations Manuals The Vendor must provide systems documentation. The documentation must describe the IPAS configuration and include data libraries, file descriptions, flow charts, and technical descriptions of the various functions. This documentation must provide the background necessary for understanding, troubleshooting, and modifying IPAS if necessary.</p> <p>The Operations Manual should include items such as routinely scheduled batch components and annual file maintenance documentation.</p> <p><b>Describe the contents and structure of your proposed manual.</b> <b>Provide samples from previous engagements.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
12	2	5	M	<p>Administrator's Manual</p> <p>The Vendor must provide an Administrator's Manual which includes all third party software manuals. This must also include a description of and instructions for the implementation of IPAS security, workflow documentation and IPAS data exchange.</p> <p><b>Describe the contents and structure of your proposed manual.</b> <b>Provide samples from previous engagements.</b></p>
12	3	0		<b>Training</b>
12	3	1	M	<p>The Vendor must provide sufficient formal classroom and on-the-job training to ensure that SLF personnel can effectively train others and support their ongoing use and the maintenance of IPAS.</p> <p>This includes training of SLF trainers in areas such as appraisal, data maintenance, and system IT support.</p> <p>The Vendor must describe the scope of training proposed including: the type(s) of SLF personnel receiving the training, training medium and the estimated length (in hours) of each session.</p> <p><b>Describe your experience in implementing phased training.</b></p> <p><b>Describe your training plan for training up to 120 staff (total) in two locations (anticipate Madison and Wausau).</b></p> <p><b>Describe your training plan for training up to 10 "trainers" in a train-the-trainer scenario in one location (Madison).</b></p>
12	3	2	M	<p>Training must include:</p> <ol style="list-style-type: none"> <li>overview of IPAS for users</li> <li>IPAS design, operations, and maintenance</li> <li>record inquiry, data entry, and similar routine operations,</li> <li>valuation modeling and analysis functions covered in the response, including use and maintenance of the cost function, the land valuation, sales comparison, and the income functions, including valuation table maintenance, extracting data to build files of logical records for analysis, regression modeling, ratio studies, and similar operations</li> <li>routine and ad hoc report generation</li> <li>year-end and other periodic processing</li> <li>interfacing with other systems and programs</li> </ol> <p><b>Describe the training in detail.</b></p>
12	4	0		<b>IPAS System Maintenance</b>
12	4	1	M	<p>Annual Support and Maintenance</p> <p>Contractor must provide support for each release of IPAS after SLF acceptance. The Contractor will provide unlimited technical support by telephone and, if the problem cannot be resolved within 48 hours, must provide on-site service and support to resolve the problem.</p> <p><b>Describe your support/maintenance plan.</b></p>
12	4	2	M	<p>Modification and Upgrades to Licensed Products</p> <p>The Contractor must provide modifications or upgrades to Licensed Products for IPAS for the during of the contract. The Contractor must revise documentation to reflect any program changes or enhancements, provided in both paper and electronic format.</p> <p><b>Describe your license upgrade plan.</b> <b>Provide hourly rates on the RFP Cost Spreadsheet.</b></p>

Sec#	Sub#	Req#	M or D	Requirement Description
12	5	0		<p><b>Data Conversion</b>                      Data conversion involves the converting of existing electronic information that SLF currently maintains into a format useable to IPAS. A set of layouts and descriptions of the basic files and databases that make up the current appraisal system (SAM and SAR) are included in Attachment V to help the Vendor in understanding the information currently stored in an electronic fashion.</p>
12	5	1	M	<p>Conversion of Electronic Information                      The Vendor must provide their approach to convert any required information from each existing SLF system to IPAS. Specifically the SAM, SAR, and MSW databases including all historic data they contain. Layouts for SAM and SAR are included in Attachment V, MSW is included in Attachment N.</p> <p>IPAS must use SLF codes for identifying counties, municipalities, school districts, special districts and TIF districts that are identified in the following systems:                      TVCC (Town, Village, City and County) in Attachment Y                      TIF (Tax Increment Finance) in Attachment Z</p> <p><b>Describe your conversion plan.</b>  <b>Provide a separate cost in the RFP Cost Spreadsheet under Release 1 for Data Conversion and Data Verification as outlined in Sections 12.5.1 – 12.5.3.</b></p>
12	5	2	M	<p>The Vendor must submit a plan outlining the conversion process. This would include a timetable for conversion as well as all work related to conversion including procedures, programming, and testing. This plan must clearly present any requirements and responsibilities of SLF. Items to be described include:</p> <ol style="list-style-type: none"> <li>1. How data will be cleansed</li> <li>2. How new data will be identified and created</li> <li>3. How all data conversion activities will be monitored</li> <li>4. Issues of timing in extracting active production data and startup of IPAS</li> <li>5. How errors will be detected, corrected, and how the user will be involved in this process</li> <li>6. Fallback strategies in the event of data conversion failures</li> </ol> <p><b>Describe your data conversion plan.</b></p>
12	5	3	M	<p>Data Verification                      The Vendor must verify converted data. This includes checking of converted information against the current SLF records.</p> <p><b>Describe your data verification process.</b></p>
				<p><b>End of Technical Requirements</b></p>