

**SERIAL 13129 RFP CAMA SOFTWARE SOLUTION**

**DATE OF LAST REVISION: December 10, 2014 CONTRACT END DATE: December 31, 2014**

**CONTRACT PERIOD THROUGH DECEMBER 31, 2024**

TO: All Departments  
FROM: Office of Procurement Services  
SUBJECT: Contract for **CAMA SOFTWARE SOLUTION**

Attached to this letter is published an effective purchasing contract for products and/or services to be supplied to Maricopa County activities as awarded by Maricopa County on **December 10, 2014**.

All purchases of products and/or services listed on the attached pages of this letter are to be obtained from the vendor holding the contract. Individuals are responsible to the vendor for purchases made outside of contracts. The contract period is indicated above.

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Wes Baysinger, Chief Procurement Officer  
Office of Procurement Services

JG/mm  
Attach

Copy to: Office of Procurement Services  
Timothy Boncoskey, Assessor  
Eric Bails, Assessor  
David Boisvert, Assessor



CONTRACT PURSUANT TO RFP

SERIAL 13129-RFP

**Contract Synopsis:**

<b>Approval Date:</b>	December 10, 2014
<b>Contract Start Date:</b>	December 10, 2014
<b>Contract End Date:</b>	December 31, 2024
<b>Contract Term:</b>	10 years, plus option for additional 10 years
<b>Contracted Parties:</b>	Maricopa County (County, Owner) Vision Government Solutions, Inc. (Contractor)

**Scope Brief:**

Contractor shall provide all products and services as defined in Exhibit A, Scope of Work to provide County with a Computer Aided Mass Appraisal (CAMA) system for the use of the Maricopa County Assessor's Office.

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## MASTER AGREEMENT

SERIAL 13129-RFP

This Master Agreement (this "Contract") is entered into as of the 10<sup>th</sup> day of December, 2014 (the "Effective Date") by and between Maricopa County ("County"), a political subdivision of the State of Arizona, and Vision Government Solutions, Inc., a Massachusetts corporation ("Contractor") for the purchase of Computer Aided Mass Appraisal Software System Implementation and Maintenance services.

### 1.0 CONTRACT TERM:

- 1.1 The term of this Contract shall commence as of the Effective Date and continue for a period of ten (10) years thereafter, until the 31<sup>st</sup> day of December, 2024 (the "Initial Term").
- 1.2 The County may, at its option and with the agreement of the Contractor, renew the term of this Contract for additional terms up to a maximum of ten (10) additional years, (or at the County's sole discretion, extend the contract on a month-to-month basis for a maximum of six (6) months after expiration). The County shall notify the Contractor in writing of its intent to extend the Contract term at least thirty (30) calendar days prior to the expiration of the original contract term, or any additional term thereafter. The Initial Term and any renewal term thereafter shall be collectively known as the "Term."

### 2.0 FEE ADJUSTMENTS:

After the completion of implementation as described in Exhibit A, Scope of Work of this Agreement, Contractor may request increases in rates for non-scope services (as described in Exhibit B) on the Contract anniversary date after Final Acceptance of Implementation Services. All requests for increases shall be accompanied by detailed supporting documents that explain the necessity of the increase. County shall independently verify each request and make a determination on the allowance of the increase(s). Requested increases to the Rate Card shall be limited to the lesser of three (3) percent or the Consumer Price Index for All Urban Consumers (CPI-U) as reported semiannually for the Phoenix-Mesa local area across the previous twelve months of published data prior to the adjustment effective date.

### 3.0 PAYMENTS:

- 3.1 As consideration for performance of the duties described herein, County shall pay Contractor the charges or fees stated in Exhibit B.
- 3.2 Payment shall be made upon the County's receipt of an acceptable invoice (in accordance with Section 3.4.1) for services rendered, subject to Part One to Exhibit A attached hereto (the "Special Terms and Conditions")
- 3.3 In the event that an acceptable invoice is over sixty (60) days past due, Contractor may suspend the Services, in whole or in part, until County has cured such failure to pay.

3.4 INVOICES:

3.4.1 Contractor shall submit one (1) legible copy of their detailed monthly invoice before payment(s) can be made. The invoice must provide the following information (if applicable):

- Company name, address and contact
- County bill-to name and contact information
- Contract serial number
- County purchase order number
- Invoice number and date
- Payment terms
- Dates of service or delivery
- Milestone Description
- Signed Acceptance Form
- Milestone Extended Price
- Retention Amount
- Total Amount Due
- If Applying travel and per diem expenses, copies of all receipts shall be provided for audit in accordance with the Contractor Travel and Per Diem Policy (Appendix 2)

3.4.2 Problems regarding billing or invoicing shall be directed to the County as listed on the applicable Purchase Order.

3.4.3 Payment shall be made to the Contractor within thirty (30) days of the date of an acceptable invoice by Accounts Payable through the Maricopa County Vendor Express Payment Program. This is an Electronic Funds Transfer (EFT) process. County shall make available the Maricopa County Vendor Express Payment Program upon Contractor's completion of the Vendor Registration Form located on the County Department of Finance Vendor Registration Web Site (<http://www.maricopa.gov/Finance/Vendors.aspx>).

3.4.4 EFT payments to the routing and account numbers designated by the Contractor will include the details on the specific invoices that the payment covers. The Contractor is required to discuss remittance delivery capabilities with their designated financial institution for access to those details.

4.0 AVAILABILITY OF FUNDS:

4.1 The provisions of this Contract relating to payment for services shall become effective when funds assigned for the purpose of compensating the Contractor as herein provided are actually available to County for disbursement. The County shall be the sole judge and authority in determining the availability of funds under this Contract. County shall keep the Contractor fully informed as to the availability of funds.

4.2 If any action is taken by any State agency, Federal department or any other agency to instrumentally suspend, decrease, or terminate its fiscal obligations under, or in connection with, this Contract, County may amend, suspend, decrease, or terminate its obligations under, or in connection with, this Contract. In the event of termination, County shall be liable for payment only for services rendered prior to the effective date of the termination, provided that such services are performed in accordance with the provisions of this Contract. County shall give written notice of the effective date of any suspension, amendment, or termination under this Section, at least ten (10) days in advance.

**5.0 DUTIES AND WARRANTIES:**

- 5.1 The Contractor shall perform all duties stated in Exhibit A, or as otherwise directed in writing by the Procurement Officer or County Designated Representative.
- 5.2 Contractor represents and warrants to, and covenants with, County that during the performance of the Services, all Services will be performed in a professional and workmanlike manner and Contractor and its employees and subcontractors (i) will abide by all laws, rules and regulations that apply to the performance of the Services and (ii) will not willfully or knowingly violate or in any way infringe any patent, trademark, copyright or other proprietary interest of any third party in its performance of the Services. EXCEPT AS EXPRESSLY PROVIDED HEREIN, CONTRACTOR MAKES AND COUNTY RECEIVES ABSOLUTELY NO WARRANTIES, EXPRESS OR IMPLIED. COUNTY DISCLAIMS ANY IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY AND TITLE.
- 5.3 Contractor will promptly re-perform the Services deemed by County not in accordance with this Contract or any Statement of Work at no additional expense to County, provided that Contractor receives notice from County within thirty (30) days after such Services were delivered to County.
- 5.4 During the Term, County shall provide Contractor's personnel with adequate workspace for consultants and such other related facilities as may be required by Contractor to carry out its obligations under this Contract.

**6.0 TERMS and CONDITIONS:**

**6.1 INDEMNIFICATION:**

- 6.1.1 Contractor shall defend, indemnify, and hold harmless County, its agents, representatives, officers, directors, officials, and employees from and against all damages, losses and expenses, including, but not limited to, attorney fees, court costs, expert witness fees, and the cost of appellate proceedings, relating to, arising out of third party claims arising from (a) the death of or personal injury to any person to the extent caused by the negligent acts, errors, omissions, mistakes or malfeasance of Contractor, its employees or subcontractors, or (b) the loss of or damage to the real or tangible personal property (whether owned or leased) to the extent caused by the negligent acts, errors, omissions, mistakes or malfeasance of Contractor, its employees or subcontractors.
- 6.1.2 The amount and type of insurance coverage requirements set forth herein will in no way be construed as limiting the scope of the indemnity in this paragraph.

The scope of this indemnification does not extend to the sole negligence of County.

**6.2 INFRINGEMENT DEFENSE INDEMNIFICATION**

- 6.2.1 Defense and Indemnity: Contractor shall defend, indemnify and hold harmless County against any Claim, as defined below as provided for in this Section for any judgments, settlements and court awarded attorney's fees resulting from a Claim where the claimant is adjudged the successful party in the Claim. Contractor's obligations under this Section are conditioned on the following: (i) County promptly notifies Contractor of the Claim in writing upon County being made aware of the Claim; (ii) County gives Contractor sole authority and control of the defense and (if applicable) settlement of the Claim, provided that County's legal counsel may participate in such defense and settlement, at County's expense, and (iii) County provides all information and assistance reasonably requested by Contractor to handle the defense or settlement of the Claim. For purposes of this Section, "Claim" means any cause of action in a third party action, suit or proceeding against County alleging that Contractor software, or its upgrades, modifications, or revisions, as of its delivery date under this Agreement, infringes a valid U.S. patent, copyright or trademark.

- 6.2.1.1 Remedial Measures: If software becomes the subject of a legal injunction pursuant to a Claim, Contractor may, at its own expense and option: (i) procure for County the right to continue use of the product; or (ii) replace or modify the software.
- 6.2.1.2 Exceptions: Contractor will have no defense or indemnity obligation for any Claim based on: (i) modifications by someone other than Contractor; (ii) software has been modified by Contractor in accordance with County-provided specifications or instructions; (iii) use or combination by the County of software with Third Party Products, open source or freeware technology; (iv) Third Party Products, open source or freeware technology; (v) a product that is used or located by County in a country other than the country in which or for which it was supplied by Contractor; (vi) possession or use of a product after Contractor has informed County of modifications or changes required to avoid such Claim and offered to implement those modifications or changes, if such Claim would have been avoided by implementation of Contractor's suggestions and to the extent County did not provide Contractor with a reasonable opportunity to implement Contractor's suggestions; or (vii) the amount of revenue or profits earned or other value obtained by the use of Contractor's products, or the amount of use of Contractor's products. "Third Party Products" means any products made by a party other than Contractor, and may include, without limitation, products ordered by County from third parties. However, components of Contractor-branded products are not Third Party Products if they are both: (i) embedded in Third Party Products (i.e., not recognizable as standalone items); and (ii) not identified as separate items on Contractor's price list, quotes, order specifications forms or Documentation.
- 6.2.1.3 The foregoing states Contractor's entire liability, and County's sole and exclusive remedy except as provided at law or equity, with respect to any infringement or misappropriation of any intellectual property rights of another party.

6.3 INSURANCE:

- 6.3.1 Contractor, at Contractor's own expense, shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of B++. In lieu of State of Arizona licensing, the stipulated insurance may be purchased from a company or companies, which are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County.
- 6.3.2 All insurance required herein shall be maintained in full force and effect during the Term. Failure to do so may, at the sole discretion of County, constitute a material breach of this Contract.
- 6.3.3 Contractor's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it.
- 6.3.4 Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect the County's right to coverage afforded under the insurance policies.
- 6.3.5 The insurance policies may provide coverage that contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to County under such policies. Contractor shall be solely responsible for the deductible and/or self-insured retention and County, at its option, may require Contractor to secure payment of such deductibles or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.

- 6.3.6 County reserves the right to request and to receive, within ten (10) working days, certified copies of any or all of the herein required insurance certificates. County shall not be obligated to review policies and/or endorsements or to advise Contractor of any deficiencies in such policies and endorsements, and such receipt shall not relieve Contractor from, or be deemed a waiver of County's right to insist on strict fulfillment of Contractor's obligations under this Contract.
- 6.3.7 The insurance policies required by this Contract, except Workers' Compensation, and Errors and Omissions, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insureds.
- 6.3.8 The policies required hereunder, except Workers' Compensation, and Errors and Omissions, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Contractor's work or service.
- 6.3.9 Commercial General Liability:
- Commercial General Liability ("CGL") insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than \$2,000,000 for each occurrence, \$2,000,000 Products/Completed Operations Aggregate, and \$4,000,000 General Aggregate Limit. The policy shall include coverage for bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provision which would serve to limit third party action over claims. There shall be no endorsement or modification of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.
- 6.3.10 Automobile Liability:
- Commercial/Business Automobile Liability insurance and, if necessary, Commercial Umbrella insurance with a combined single limit for bodily injury and property damage of not less than \$2,000,000 each occurrence with respect to any of the Contractor's owned, hired, and non-owned vehicles assigned to or used in performance of the Contractor's work or services under this Contract.
- 6.3.11 Workers' Compensation:
- 6.3.11.1 Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Contractor's employees engaged in the performance of the work or services under this Contract; and Employer's Liability insurance of not less than \$1,000,000 for each accident, \$1,000,000 disease for each employee, and \$1,000,000 disease policy limit.
- 6.3.11.2 Contractor waives all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Contractor pursuant to this Contract.
- 6.3.12 Errors and Omissions Insurance:
- Errors and Omissions insurance and, if necessary, Commercial Umbrella insurance, which will insure and provide coverage for errors or omissions of the Contractor, with limits of no less than \$5,000,000 for each claim.
- 6.3.13 Certificates of Insurance.
- 6.3.13.1 Prior to commencing work or services under this Contract, Contractor shall furnish the County with valid and complete certificates of insurance, or formal

endorsements as required by the Contract in the form provided by the County, issued by Contractor's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Contract are in full force and effect. Such certificates shall identify this contract number and title.

6.3.13.1.1 In the event any insurance policy(ies) required by this Contract is (are) written on a "claims made" basis, coverage shall extend for two (2) years past completion and acceptance of Contractor's work or services and as evidenced by annual Certificates of Insurance.

6.3.13.1.2 If a policy does expire during the Term, a renewal certificate must be sent to County fifteen (15) days prior to the expiration date.

6.3.14 Cancellation and Expiration Notice.

Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to County.

6.4 NOTICES:

All notices given pursuant to the terms of this Contract shall be addressed to:

For County:

Maricopa County  
Office of Procurement Services  
ATTN: Contract Administration  
320 West Lincoln Street  
Phoenix, Arizona 85003-2494

For Contractor:

Vision Government Solutions, Inc.  
Attn: Brian McDonald, President  
44 Bearfoot Road  
Northborough, MA 01532

6.5 REQUIREMENTS CONTRACT:

6.5.1 Contractor signifies its understanding and agreement by signing this document that this Contract is a requirements contract. This Contract does not guarantee any purchases will be made (minimum or maximum). Orders will only be placed when County identifies a need and issues a purchase order or a written notice to proceed.

6.6 TERMINATION FOR CONVENIENCE:

The County reserves the right upon sixty (60) days' prior written notice, or forty-five (45) days' prior written notice in the event of an assignment of this Contract by Contractor that does not require the County's prior written approval, to terminate the Contract, in whole or in part at any time, when in the best interests of the County without penalty or recourse. Upon receipt of the written notice, the Contractor shall immediately stop all work, as directed in the notice, notify all subcontractors of the effective date of the termination and minimize all further costs to the County. In the event of termination under this paragraph, all documents, data and reports prepared by the Contractor under the Contract shall become the property of and be delivered to the County upon demand and settlement pursuant to part (a) and (b) below. In the event of a termination or expiration of this Contract, the Contractor shall be entitled to receive just and equitable compensation for work completed and materials accepted before the effective date of the termination and pro-rated compensation for works in progress and such pro-ration will be based on the time and materials expended by Contractor; provided, that, for work in progress (a) County shall promptly pay Contractor the full payment amount, if any, retained by County (i.e., holdback

amount) in connection with the applicable completed Milestone, and (b) shall thereafter continue to negotiate in good faith any additional amounts payable to Contractor by County. Notwithstanding anything to the contrary herein, any dispute, difference or question relating to or arising among the parties concerning the amount to be paid pursuant to part (a) or (b) will be submitted and settled by arbitration by a single arbitrator chosen by the corresponding Regional Office of the American Arbitration Association in accordance with the Commercial Rules of the American Arbitration Association. The parties shall submit briefs of no more than ten (10) pages and the arbitration hearing shall be limited to two (2) days maximum. The parties shall complete such arbitration within 90 days of the Contractor's receipt of the notice of cancellation and payments due to the Contractor shall be paid within ten (10) days of the determination of the arbitrator. The arbitrator shall apply Arizona law.

**6.7 TERMINATION FOR DEFAULT:**

6.7.1 In addition to the rights reserved in the Contract, County may terminate the Contract in whole or in part due to the failure of the Contractor to comply with any material term or condition of the Contract if such failure is not cured within forty-five (45) days of the County's notice of such failure to Contractor. The County's Procurement Officer shall provide written notice of the termination and the reasons for it to the Contractor.

6.7.2 Upon termination under this paragraph, all goods, materials, documents, data and reports prepared by the Contractor under the Contract shall become the property of and be delivered to the County on demand.

6.7.3 The County may, upon termination of this Contract, procure, on terms and in the manner that it deems appropriate, materials or services to replace those under this Contract. The Contractor shall be liable to the County for any excess costs incurred by the County in procuring materials or services in substitution for those due from the Contractor.

6.7.4 The Contractor shall continue to perform, in accordance with the requirements of the Contract, up to the date of termination, as directed in the termination notice.

**6.8 TERMINATION BY COUNTY:**

If the Contractor should be adjudged bankrupt, or should make a general assignment for the benefit of its creditors, or if a receiver should be appointed on account of its insolvency, the County may terminate the Contract. If the Contractor should persistently or repeatedly refuse or should fail, except in cases for which extension of time is provided, to provide enough properly skilled workers or proper materials, or persistently disregard laws and ordinances, or not proceed with work or otherwise be guilty of a substantial violation of any provision of this Contract, then the County may terminate the Contract. Prior to termination of the Contract, the County shall give the Contractor fifteen- (15) calendar day's written notice. Upon receipt of such termination notice, the Contractor shall be allowed fifteen (15) calendar days to cure such deficiencies.

**6.9 STATUTORY RIGHT OF CANCELLATION FOR CONFLICT OF INTEREST:**

Notice is given that pursuant to A.R.S. §38-511 the County may cancel this Contract without penalty or further obligation within three years after execution of the contract, if any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of the County is at any time while the Contract or any extension of the Contract is in effect, an employee or agent of any other party to the Contract in any capacity or consultant to any other party of the Contract with respect to the subject matter of the Contract. Additionally, pursuant to A.R.S §38-511 the County may recoup any fee or commission paid or due to any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of the County from any other party to the contract arising as the result of the Contract.

6.10 LIMITATION OF LIABILITY.

6.10.1 IN NO EVENT SHALL CONTRACTOR BE LIABLE UNDER THIS AGREEMENT FOR PUNITIVE, INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES OR EXPENSES ARISING OUT OF THIS AGREEMENT EVEN IF IT HAS BEEN ADVISED OF THE POSSIBLE EXISTENCE OF SUCH LIABILITY.

6.10.2 FOR LIABILITY ARISING PRIOR TO COUNTY'S FINAL ACCEPTANCE, IN NO EVENT SHALL CONTRACTOR'S LIABILITY TO COUNTY OR ANY THIRD PARTY SEEKING DAMAGES UNDER THIS AGREEMENT EXCEED THE AGGREGATE VALUE OF IMPLEMENTATION AS DESCRIBED IN EXHIBIT B.

FOR LIABILITY ARISING ON OR AFTER THE DATE OF COUNTY'S FINAL ACCEPTANCE, IN NO EVENT SHALL CONTRACTOR'S LIABILITY TO COUNTY OR ANY THIRD PARTY SEEKING DAMAGES UNDER THIS AGREEMENT EXCEED THE AMOUNT PAID TO CONTRACTOR DURING THE TWELVE (12) MONTHS IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO THOSE DAMAGES CLAIMED.

6.11 FORCE MAJEURE

6.11.1 Neither party shall be liable for failure of performance, nor incur any liability to the other party on account of any loss or damage resulting from any delay or failure to perform all or any part of this Contract if such delay or failure is caused by events, occurrences, or causes beyond the reasonable control and without negligence of the parties ("Force Majeure Events"). Such events, occurrences, or causes will include acts of God/nature (including fire, flood, earthquake, storm, hurricane or other natural disaster), war, invasion, act of foreign enemies, hostilities (whether war is declared or not), civil war, riots, rebellion, revolution, insurrection, military or usurped power or confiscation, terrorist activities, nationalization, government sanction, lockout, blockage, embargo, labor dispute, strike, interruption or failure of electricity or telecommunication service.

6.11.2 Each party, as applicable, shall give the other party notice of its inability to perform and particulars in reasonable detail of the cause of the inability. Each party must use commercially reasonable efforts to remedy the situation and remove, as soon as practicable, the cause of its inability to perform or comply.

6.11.3 The party asserting *Force Majeure* as a cause for non-performance shall have the burden of proving that reasonable steps were taken to minimize delay or damages caused by foreseeable events, that all non-excused obligations were substantially fulfilled, and that the other party was timely notified of the likelihood or actual occurrence which would justify such an assertion, so that other prudent precautions could be contemplated.

6.11.4 The County shall reserve the right to terminate this Contract and/or any applicable order or contract release purchase order upon non-performance by Contractor. The County shall reserve the right to extend the Contract and time for performance at its discretion.

6.12 OFFSET FOR DAMAGES;

In addition to all other remedies at law or equity, the County may, in good faith, offset from any money due to the Contractor any amounts Contractor owes to the County for damages resulting from breach or deficiencies in performance under this Contract.

6.13 ADDITIONS/DELETIONS OF SERVICE AND CONTRACTOR EMPLOYEE MANAGEMENT:

6.13.1 The County reserves the right to add and/or delete materials or services to the Contract. If a service requirement is deleted, payment to the Contractor will be reduced proportionately, to the amount of service reduced in accordance with the pricing in

Exhibit B. If additional materials are required from a Contract, prices for such additions will be negotiated between the Contractor and the County.

- 6.13.2 The County reserves the right of final approval on proposed staff for all Tasks. Also, upon request by the County, the Contractor will be required to remove any employees working on County projects and substitute personnel based on the discretion of the County within two weeks, unless previously approved by the County. In no event shall County be liable for any costs related to delays arising from this Section 6.13, except for circumstances arising under Section 6.13.1 above as expressed in the applicable Change Order.
- 6.13.3 Contractor shall endeavor to maintain the provided personnel throughout the implementation of the Solution. In the event that Contractor personnel's employment status changes, Contractor shall provide County a list of proposed candidates with equivalent experience with the Solution. County reserves the right to assist in the selection of the replacement candidate.
- 6.13.4 Contractor shall not reassign any key personnel without the express consent of the County (which shall not be unreasonably withheld, delayed or conditioned). Key personnel shall be defined as the following roles:
  - A. Project Manager
  - B. Senior Business Analyst
  - C. Development Lead
  - D. Data Conversion Lead
  - E. Executive Sponsor
  - F. Management Level Technical Sponsor
- 6.13.5 County reserves the right to immediately remove from its premises any Contractor personnel it deems to be causing any risk or disruption to County functions.
- 6.13.6 Contractor acknowledges that its personnel shall be subject to background inspections of various levels of severity depending on level of secured access for the assigned tasks. Contractor further agrees to replace any personnel who fail to pass the required background check at the discretion of the County.

6.14 RELATIONSHIPS:

In the performance of the services described herein, the Contractor shall act solely as an independent contractor, and nothing herein or implied herein shall at any time be construed as to create the relationship of employer and employee, partnership, principal and agent, or joint venture between County and Contractor.

6.15 ASSIGNMENT:

No assignment of this Contract or of any rights or obligations hereunder may be made by either party without the prior written consent of the other party and any attempted assignment without the required consent shall be void; provided, however, that notwithstanding the foregoing, and without prior written consent of County, (i) Contractor shall have the right to pledge, assign or otherwise transfer this Contract and its rights hereunder, in whole or in part, as collateral security to any lender, and (ii) Contractor shall have the right to assign or transfer this Contract and its rights hereunder, in whole or in part, to any direct or indirect wholly-owned subsidiary of Contractor ("Contractor Subsidiary") or to any entity into which a Contractor Subsidiary may be merged or consolidated or any entity which purchases all or substantially all of the assets or capital stock of Contractor; provided, further, however, that (a) such subsidiary or entity agrees to be bound by the terms of this Contract and (b) any such assignment or transfer shall not relieve that party from any liability or obligation under this Contract.

**6.16 SUBCONTRACTING:**

Upon prior written approval by County, Contractor may subcontract work under this Contract; provided, however, that subcontracting shall not relieve Contractor of its responsibility and liability for any work performed by its subcontractor.

**6.17 AMENDMENTS:**

All amendments to this Contract shall be in writing and approved/signed by both parties. Maricopa County Office of Procurement Services shall be responsible for approving all amendments for County.

**6.18 ACCESS TO AND RETENTION OF RECORDS FOR THE PURPOSE OF AUDIT AND/OR OTHER REVIEW:**

6.18.1 In accordance with section MCI 371 of the Maricopa County Procurement Code the Contractor agrees to retain all books, records, accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract for six (6) years after final payment or until after the resolution of any audit questions which could be more than six (6) years, whichever is latest. County, Federal or State auditors and any other persons duly authorized by the Office of Procurement Services shall have full access to, and the right to examine, copy and make use of, any and all said materials.

6.18.2 If the Contractor's books, records, accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract are not sufficient to support and document that requested services were provided, the Contractor shall reimburse County for the services not so adequately supported and documented.

6.18.3 If at any time it is determined by the County that a cost for which payment has been made is a disallowed cost, the County shall notify the Contractor in writing of the disallowance. The course of action to address the disallowance shall be at sole discretion of the County, and may include either an adjustment to future claim submitted by the Contractor by the amount of the disallowance, or to require reimbursement forthwith of the disallowed amount by the Contractor by issuing a check payable to Maricopa County.

**6.19 AUDIT DISALLOWANCES:**

If at any time, County determines that a cost for which payment has been made is a disallowed cost, such as overpayment, County shall notify the Contractor in writing of the disallowance. County shall also state the means of correction, which may be but shall not be limited to adjustment of any future claim submitted by the Contractor by the amount of the disallowance, or to require repayment of the disallowed amount by the Contractor.

**6.20 SEVERABILITY:**

The invalidity, in whole or in part, of any provision of this Contract shall not void or affect the validity of any other provision of this Contract.

**6.21 PROPRIETARY RIGHTS IN DATA:**

County shall own and have the use of all County Data and reports resulting from this Contract without additional cost or other restriction except as provided by law. Each party shall supply to the other party, upon request, any available information that is relevant to this Contract and to the performance hereunder. Notwithstanding the foregoing, all intellectual property rights (including, without limitation, copyrights and trade secrets) to deliverables, documentation and Software (including customized Software) developed by Contractor, whether developed by Contractor prior to or in the course of providing the Services, shall belong exclusively to Contractor. "County Data" shall mean any data provided by County or entered into the Software.

**6.22 INTEGRATION:**

This Contract represents the entire and integrated agreement between the parties and supersedes all prior negotiations, proposals, communications, understandings, representations, or agreements, whether oral or written, express or implied.

**6.23 ORDER OF PRECEDENCE:**

In the event of a conflict in the provisions of this Contract and its Exhibits, Appendices, or County issued Purchase Orders, the following order of precedence shall prevail:

1. Contract
2. Change Order Documents
3. Exhibit D, Software License Agreement
4. Exhibit C, Software Maintenance Agreement
5. Exhibit A, Scope of Work
6. Exhibit B, Price Agreement
7. Appendix 1, Functional and Technical Requirements
8. Appendix 2, Contractor Travel and Per Diem Policy
9. Appendix 3, Statement of Work Support Documents
10. County issued Purchase Order or Work Release
11. Acceptance Documents

**6.24 VERIFICATION REGARDING COMPLIANCE WITH ARIZONA REVISED STATUTES §41-4401 AND FEDERAL IMMIGRATION LAWS AND REGULATIONS:**

6.24.1 By entering into the Contract, the Contractor warrants compliance with the Immigration and Nationality Act (INA using E-verify) and all other federal immigration laws and regulations related to the immigration status of its employees and A.R.S. §23-214(A). The Contractor shall obtain statements from its subcontractors certifying compliance and shall furnish the statements to the Procurement Officer upon request. These warranties shall remain in effect through the term of the Contract. The Contractor and its subcontractors shall also maintain Employment Eligibility Verification forms (I-9) as required by the Immigration Reform and Control Act of 1986, as amended from time to time, for all employees performing work under the Contract and verify employee compliance using the E-verify system and shall keep a record of the verification for the duration of the employee's employment or at least three years, whichever is longer. I-9 forms are available for download at USCIS.GOV.

6.24.2 The County retains the legal right to inspect contractor and subcontractor employee documents performing work under this Contract to verify compliance with paragraph 6.24.1 of this Section. Contractor and subcontractor shall be given reasonable notice of the County's intent to inspect and shall make the documents available at the time and date specified. Should the County suspect or find that the Contractor or any of its subcontractors are not in compliance, the County will consider this a material breach of the Contract and may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

**6.25 CONTRACTOR LICENSE REQUIREMENT:**

6.25.1 Contractor shall procure all permits, insurance, licenses and pay the charges and fees necessary and incidental to the lawful conduct of the Services, and as necessary complete any required certification requirements, required by any and all governmental or non-governmental entities as mandated to maintain compliance with and in good standing for all permits and/or licenses. Contractor shall endeavor to keep fully informed of existing and future trade or industry requirements, Federal, State and Local laws, ordinances, and regulations which in any manner affect the fulfillment of a Contract and shall comply

with the same. Contractor shall immediately notify both Office of Procurement Services and the using agency of any and all changes it has knowledge of concerning permits, insurance or licenses.

**6.26 CERTIFICATION REGARDING DEBARMENT AND SUSPENSION**

- 6.26.1 The undersigned (authorized official signing for Contractor) certifies to the best of his or her knowledge and belief as of the Effective Date or Renewal Date, that Contractor, and its principals:
- 6.26.1.1 are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal Department or agency;
  - 6.26.1.2 have not within the 3-year period preceding this Contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - 6.26.1.3 are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
  - 6.26.1.4 have not within the 3-year period preceding this Contract had one or more public transaction (Federal, State or local) terminated for cause of default.
- 6.26.2 Should the Contractor not be able to provide this certification, an explanation as to why should be attached to the Contract.

The Contractor agrees to include, without modification, this clause in all lower tier covered transactions (i.e. transactions with subcontractors) and in all solicitations for lower tier covered transactions related to this Contract.

**6.27 GOVERNING LAW:**

This Contract shall be governed by the laws of the state of Arizona. Venue for any actions or lawsuits involving this Contract will be in Maricopa County Superior Court or in the United States District Court for the District of Arizona, sitting in Phoenix, Arizona.

**6.28 INFLUENCE**

As prescribed in MC1-1202 of the Maricopa County Procurement Code, any effort to influence an employee or agent to breach the Maricopa County Ethical Code of Conduct or any ethical conduct, may be grounds for Disbarment or Suspension under MC1-902. An attempt to influence includes, but is not limited to:

- 6.28.1 A Person, as defined in MC1-101, offering or providing a gratuity, gift, tip, present, donation, money, entertainment or educational passes or tickets, or any type valuable contribution or subsidy,
- 6.28.2 That is offered or given with the intent to influence a decision, obtain a contract, garner favorable treatment, or gain favorable consideration of any kind.

If a Person attempts to influence any employee or agent of County, the Chief Procurement Officer, or his designee, reserves the right to seek any remedy provided by the Maricopa County Procurement Code, any remedy in equity or in the law, or any remedy provided by this Contract.

6.29 PUBLIC RECORDS:

All Offers submitted and opened are public records and must be retained by the Records Manager at the Office of Procurement Services. Offers shall be open to public inspection after Contract award and execution, except for such Offers deemed to be confidential by the Office of Procurement Services. If an Offeror believes that information in its Offer should remain confidential, it shall indicate as confidential, the specific information and submit a statement with its offer detailing the reasons that the information should not be disclosed. Such reasons shall include the specific harm or prejudice which may arise. The Records Manager of the Office of Procurement Services shall determine whether the identified information is confidential pursuant to the Maricopa County Procurement Code.

All awarded contracts are considered public record and shall be made available for inspection unless Contractor has made a petition to mark confidential certain portions of the Contract. Contractor shall provide County with detail notice prior to contract award that contains the desired portions to be labeled confidential as well as a description as to why disclosure would cause harm to the Contractor. All requests shall be reviewed by the Chief Procurement Officer in accordance the Maricopa County Procurement Code.

6.30 INCORPORATION OF DOCUMENTS:

The following are to be attached to and made part of this Contract:

- 6.30.1 Exhibit A, Scope of Work;
- 6.30.2 Exhibit B, Price Agreement;
- 6.30.3 Exhibit C, Software Maintenance Agreement;
- 6.30.4 Exhibit D, Software License Agreement;
- 6.30.5 Appendix 1, Functional and Technical Requirements; and
- 6.30.6 Appendix 2, Office of Procurement Services Contractor Travel and Per Diem Policy; and
- 6.30.7 Appendix 3, Statement of Work Support Documents

IN WITNESS WHEREOF, this Contract is executed on the date set forth above.

CONTRACTOR

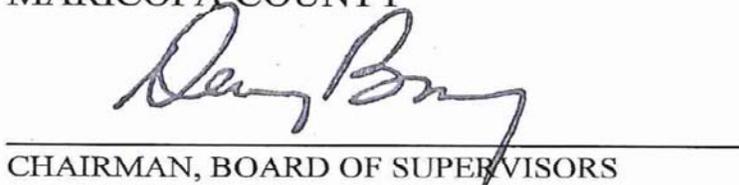
  
AUTHORIZED SIGNATURE

Brian McDonald, President  
PRINTED NAME AND TITLE

44 Bearfoot Road, 2<sup>nd</sup> Floor, Northborough, MA 01532  
ADDRESS

11/18/14  
DATE

MARICOPA COUNTY

  
CHAIRMAN, BOARD OF SUPERVISORS

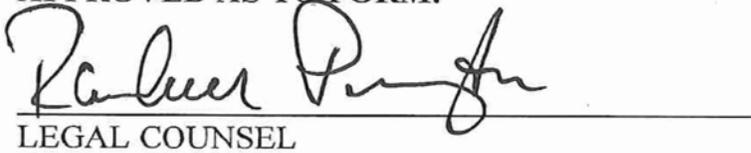
DEC 10 2014  
DATE

ATTESTED:

  
CLERK OF THE BOARD

DEC 10 2014  
DATE

APPROVED AS TO FORM:

  
LEGAL COUNSEL

5 Dec 2014  
DATE



EXHIBIT A, SCOPE OF WORK

SERIAL 13129 –RFP

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Part One – Special Terms and Conditions

Part Two – Statement of Requirements

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## 1. PART ONE – SPECIAL TERMS AND CONDITIONS

### 1.1 DEFINITIONS

1. **“Acceptance”** shall mean that a signed Deliverable Acceptance Statement from the County has been sent to Contractor indicating that a Deliverable has met the acceptance criteria set forth hereinafter.
2. **“Artifacts”** are items/activities that are required for project success but are not subject to Acceptance.
3. **“BA”** shall mean business analyst.
4. **“Business Day”** shall mean one regular eight-hour workday (Monday through Friday) as defined by the County’s business calendar.
5. **“Day/Days”** shall mean, unless noted otherwise, one calendar day.
6. **“Defect”** shall represent a condition in the software product which produces unexpected or incorrect results, does not meet the expected software requirement, or does not meet reasonable end-user expectations. A “Minor Defect” is a Defect pursuant to the table in section 2.3.5 below regarding Defects classified as “Sev 3”.
7. **“Deliverable”** shall mean any product, service, document, software, data, or other item produced by Contractor and provided to the County for Acceptance.
8. **“Final Acceptance”** shall mean the point at which Contractor has substantially met all of the material requirements and conditions of the SOW.
9. **“Final Completion”** shall mean the point at which Contractor has substantially provided all of the Deliverables of the SOW. Final Completion precedes Final Acceptance.
10. **“Fix”** shall mean the Contractor’s response with corresponding solution to a reported Defect.
11. **“Flaw”** is a Defect pursuant to to the table in section 2.3.5 below regarding Defects classified as “Sev 4”. Examples of a Flaw can be (but not limited to) a typographical error, or an error in the aesthaetic of the user interface not impairing the software’s reaasonble use.
12. **“GAD”** shall mean Gap Analysis Document – a list of findings as a result of meetings comparing existing System functionality against legacy system and desired functionality.
13. **“Gap Analysis”** shall mean the body of work needed to understand the variance between the County functional/business requirements, methods, or policy, and Contractor’s software.
14. **“Go-Live Date”** shall be the date that County and Contractor establish as the date Contractor’s System will replace the County’s existing system as the day-to-day operational system.
15. **“Integration”** shall mean provision of custom interfaces and code to allow data exchange between distinct software applications or databases.
16. **“Interface”** shall mean programmed languages, codes and messages that programs use to communicate with each other and to make information available.
17. **“Issue”** any condition which does or may adversely affect the ability of the project to produce the required Deliverables, or which requires intervention in order to correct the condition.
18. **“ITD”** shall mean the Assessor’s Information Technology Division.
19. **“Milestones”** shall mean those milestones that Contractor shall meet, including the milestones for the Implementation Services, for which County shall pay Contractor an agreed amount upon completion of the applicable milestone.
20. **“Onsite”** shall mean the activity shall be conducted at County facilities.
21. **“PM”** shall mean project manager.

22. **“Remote”** shall mean the activity shall be conducted using secure remote internet connection and software, and teleconferencing equipment as required.
23. **“SME”** shall mean subject matter expert.
24. **“SOW”** shall mean the Statement of Work, Exhibit A, Part Three.
25. **“System”** shall mean the final configuration and setup of the Contractor software product, including migrated or converted County data, installation, configuration, database design, and integrations, so that all elements perform as a single unit in the manner intended.
26. **“System Acceptance”** shall mean the System is fully operational in the production environment and performing in conformity with Acceptance criteria described herein.
27. **“System Readiness”** shall mean the System is fully operational in a non-production environment and performing in conformity with the standard required to deploy the System to the production environment.
28. **“Task”** shall mean a set of activities in the SOW with a common purpose.
29. **“Test Script”** shall mean a series of actions, functions or commands documented for the purpose of execution during quality assurance testing.
30. **“Track”** shall mean a group of related Tasks in the SOW.

1.2 PAYMENT RETENTION:

- 1.2.1 Twenty percent (20%) of monies payable for Implementation Services in accordance with Exhibit B (provided, that the applicable Milestone is designated as eligible for payment retention) earned by Contractor related to work under this agreement shall be retained by County until Final Completion of the services herein described in accordance with this Exhibit. County may elect to release specific retention payments based on mutually agreed milestones, but in no case shall retention be fully released prior to Final Completion. All other payment terms and conditions shall not be affected by the retention. In the event of termination or cancellation of this contract by County through no fault of Contractor, Contractor shall be entitled to the refund of any funds in the retention account. Any interest earned on retainage shall accrue solely to the benefit of County.
- 1.2.2 The Contractor shall have the right, pursuant to Arizona Revised Statutes, to submit securities in lieu of retention for all work completed. The Contractor is required to request this option at least ten (10) business days prior to submission of first Application for Payment to allow time for preparation of forms. The Contractor shall request and obtain securities forms through County. The County must identify either securities option or retention option prior to first Application for Payment.

1.3 CHANGE ORDER PROCEDURE:

In the event that either party determines that product or services are required to be added to or deleted from the Contract, the following procedure shall be followed:

- 1.3.1 The identifying party shall draw up a formal document (the “Change Order”) that shall include, but not be limited to;
  - 1.3.1.1 A description of the item to be added/deleted
  - 1.3.1.2 Rationale for the change
  - 1.3.1.3 Specific cross reference (document/section) to where the change is proposed
  - 1.3.1.4 Detailed adjustment to project schedule
  - 1.3.1.5 Proposed adjustment to impacted price/milestone

1.3.2 The proposed change shall be presented to the other party's Project Manager (or duly authorized representative) for review. Said review shall not take longer than 10 business days.

1.3.3 The affected party may provide specific written commentary to the proposing party.

1.3.4 Once agreed as to form by the parties, the following shall be the sole executors of the Change Order for inclusion into the Contract:

For the County: Chief Procurement Officer or the Maricopa County Board of Supervisors as determined by the County

For Vision Government Solutions: Vice President of Implementation (Cynthia Williamson as of the Effective Date)

1.3.5 In no event shall either party act upon a proposed Change Order until fully executed by the parties. The acting party may be liable for all associated costs for products or services rendered under an un-authorized Change Order.

1.3.6 Verbal agreements or directions given by either party that may have an effect on the Contract are not binding.

1.3.7 Forms for Change Orders are contained in Appendix 3, Part F and G.

#### 1.4 HARDWARE

No hardware is included in this Contract unless mutually agreed to by the parties. If necessary, any server upgrades or purchases will be performed under a separate procurement process. However, County acknowledges that Contractor has already and will continue to provide recommended hardware requirements.

#### 1.5 ACCEPTANCE:

Contractor shall provide an implementation testing and acceptance plan that shall clearly delineate any and all tasks that it expects County personnel to perform, including a clear time-line with milestones and estimated effort for said tasks. Acceptance criteria for the implementation and subsequent upgrade and maintenance updates throughout the life of this Contract shall conform to those listed in the Statement of Work, Exhibit A, Part Three, §10.3.3. Total Software Score (TSS) will be calculated by County in accordance with Requirements and Use Cases previously accepted. More detail on the TSS approach is available in the Statement of Work, Exhibit A, Part Three, §2.3.5.

The County Project Manager must approve all test plans and associated evaluation criteria prior to the initiation of the testing process. All project milestones shall be subject to a formal acceptance process approved by the County Project Manager. Only acceptance forms signed by designated County employees and counter signed by the County Project Manager will constitute formal acceptance of deliverables.

#### 1.6 MINIMUM OPERATIONAL REQUIREMENTS:

The parties agree to mutually develop baseline operational requirements through the Fit Gap process. Minimum Operational Requirements shall be delivered to County and incorporated into the project charter during the Startup Phase of Implementation.

#### 1.7 SERVICE LEVEL AGREEMENT:

##### 1.7.1 Escalation Schedule

1.7.1.1 User Support

All user support response times assume Contractor holds business hours 8:30AM to 4:30PM Eastern Standard or Daylight Time while County holds business hours 8:00AM to 5:00PM Mountain Standard Time. Deadlines are governed by the time zone in which services are performed.

1.7.1.1.1 Level 1: Synchronous, real-time assistance by telephone or quick response to emailed inquiries. Initial diagnostics & reference to support knowledgebase. May include remote control of the user’s desktop. County will provide this level for application, systems administration, database administration, and business process issues.

1.7.1.1.2 Level 2: Asynchronous, scheduled service calls for desk-side assistance or remote control of the user’s desktop. Includes reconfiguration or re-installation of software components. May be provided by Contractor or County based on the source of the issue. Those issues wholly within the Solution shall be Contractor’s responsibility, though Contractor may request County resources to perform local services at desktops or server. Contractor shall acknowledge all Level 2 issues within one business hour and provide an estimate for resolution within eight business hours.

Level 2 issues escalated to Contractor will come through a designated contact within the County Assessor’s Office Technology Division.

1.7.1.1.3 Level 3: Critical software failures, code debugging, &etc. Support is provided by solely by Contractor and escalated internally.

1.7.1.1.4 For Level 2 and Level 3 user support issues, resolutions shall be delivered within the same guidelines set for Software Defects during implementation,

<b>CLASSIFICATION</b>	<b>SYSTEM DEFINITION</b>	<b>PROJECT DEFINITION/GUIDELINES</b>
<b>SEV1</b>	Prevents critical business process from functioning or causes data corruption. Legislative related or deadline oriented. No workaround exists.	<ul style="list-style-type: none"> <li>✓ Resolution needed immediately and expected within one business day.</li> <li>✓ Other tasking is stalled and is dependent on effective resolution.</li> </ul>
<b>SEV2</b>	Prevents or impedes non-critical business process from functioning. A non-reproducible issue that prevents a critical business process from functioning. A data-related issue that cannot be recreated at Contractor. An acceptable short-term work around exists.	<ul style="list-style-type: none"> <li>✓ Resolution needed &lt;= 5 work days.</li> <li>✓ Other tasking is (or is about to be) stalled and is dependent on effective resolution.</li> </ul>
<b>SEV3</b>	Prevents or impedes lower impact non-critical business processes. A lower impact customer-specific issue related to a customization for that customer.	<ul style="list-style-type: none"> <li>✓ Resolution needed &gt; 5&lt;=10 work days.</li> <li>✓ Attention needed by next PM meeting.</li> <li>✓ Needs resolution to address a risk; research a project approach, or prevent a future project task delay, etc.</li> </ul>

1.7.2 Remedy for Breach of Service Levels

1.7.2.1 Root Cause

County and Contractor recognize that multitier solutions have many possible points of failure and that any service level breach or remedy contemplated in this Contract applies

only to failure of Contractor's software to provide agreed-upon functions. Faults whose root causes lie with County or third-party resources (eg, telecommunications) are outside the scope of this Service Level Agreement. The time to resolution shall not commence until both County and Contractor have isolated the fault to a Defect in Contractor's software.

#### 1.7.2.2 Remedy

For faults due to Contractor's software, for each day beyond the Service Level Agreement the Defect remains unresolved, County shall receive a credit towards the next Maintenance invoice of one day's value of that year's maintenance cost.

#### 1.7.2.3 Remedy Examples

1.7.2.3.1 Severity 1 Example. During overnight batch processing of the Notices of Value, the system fails to create the proper report file on the reporting server. At 7:00am MST the following morning, County has determined that all input files to that process conform to data standards and that the reporting server has not produced any system errors. Contractor receives information about the fault at 10:30am Eastern time and confirms the diagnosis is a software function. Contractor provides a patch by 6:30am MST the next day which fixes the issue during an emergency daytime batch run. Service level is met, and there is no breach and no need for remedy.

1.7.2.3.2 Severity 2 Example. Online appeals collected via County's website are not uploading to the CAMA Solution database as designed. County and Contractor agree that the failure is in the import software module and not operating system error. There is no loss of data, but the appeals cycle will be delayed considerably if the CAMA Solution is not refreshed soon, making this a Severity 2. Contractor provides a patch seven business days later, two days over the agreed service level. The service level breach is remedied in the next Maintenance Fee billing cycle with a credit of 0.797% of the annual fee, thus representing the two-day lag in service level.

1.7.2.3.3 Severity 3 Example. Appeals rejection notices are produced without the required bar code. Contractor states that this error is due to the latest patch. County can work without the convenience of a bar code, but this is loss of functionality. Contractor provides new patch within seven business days, and County is able to print bar codes on appeals correspondence once again. As the service level for Severity 3 is ten business days, there is no breach and no need for remedy.

1.7.2.3.4 Out of Scope Example. County staff cannot login to the solution from within one location but can remotely and from a second downtown location. County technical staff identifies a network failure, so the fault is not within scope of Contractor's services and is therefore not escalated to Contractor.

### 1.8 SOURCE CODE ESCROW REQUIREMENT:

1.8.1 Contractor shall provide all source and compiled code and any updates or fixes for the Contractor Commercial Off the Shelf ("COTS") application software that County has purchased from Contractor for safekeeping with an mutually acceptable escrow agent within thirty (30) days of award. The software source code and compiled code deposited with the escrow agent will be a snapshot of all source and executable code maintained by Contractor in the form of an archive in a recognized version control system (e.g. Vault or Visual SourceSafe). In this way, as beneficiary of the escrow agreement between Contractor and escrow agent, County will have access to all source

code of the products that they license for all versions of the software that they have licensed. Furthermore, the escrowed code shall include all code specifically developed for County including, but not limited to: interfaces, Extraction-Transformation-Loading (ETL) routines for data conversion, and all custom code. Upon taking possession of the source code, County will have the right to use the source for products that they license in the versions currently installed on the System or any subsequent versions in the archive. Commencing with acceptance of Deliverable D7: *Hardware & Software Installation Track Acceptance Form*, Contractor will make a deposit of the archive with the escrow agent in line with the Contractor's software release schedule, but not less often than once every six (6) months throughout the life of this Agreement. Each deposit *may* be verified by County through installation of the compiled code, at County's option and expense.

1.8.2 County hereby agrees to pay all subscription and service fees to the Escrow Agent.

1.8.3 County shall have access to the escrowed code in the event of any of the following circumstances:

1.8.3.1 the sale, assignment, or transfer to any third party of any of Contractor's rights in the licensed product (or any portion thereof) if such sale, assignment, or transfer may prevent Contractor from fully performing any of its obligations under this Contract ;

1.8.3.2 Contractor becomes insolvent or commits any affirmative act of insolvency, or generally fails to pay, or admits in writing its inability to pay, debts as they become due, makes a general assignment for the benefit of creditors, files a voluntary petition of bankruptcy, suffers or permits the appointment of a receiver for its business or assets, becomes subject to any proceeding under, or case in, any bankruptcy or insolvency law, or Contractor takes any action to authorize, or in the furtherance of, any of the foregoing;

1.8.3.3 Contractor discontinues providing full support and maintenance services for the licensed product in accordance with its obligations pursuant to any agreement with Maricopa County;

1.8.3.4 Contractor has ceased to do business or intentionally refuses to provide any services pursuant to any agreement with Maricopa County;

1.8.3.5 Contractor has breached (and if subject to a cure period, has not cured such breach within such period) any material term or condition of any agreement with Maricopa County;

1.8.3.6 Any change of control of Contractor or Contractor's parent company, where such party is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of such party are acquired by any entity, or such party is merged with or into another entity to form a new entity; or

1.8.3.7 Any other circumstance in which County is entitled to access or use the applicable deposit materials (including, but not limited to, the source code) under the express terms of any agreement between Contractor and County.

1.8.4 Upon Maricopa County taking possession of the source code, Maricopa County hereby agrees as follows:

1.8.4.1 County accepts full and total responsibility for the safekeeping of the source code. County agrees that such source code shall be subject to the restrictions of transfer, sale, and reproduction placed on the software itself as stated in the software license signed by all parties.

1.8.4.2 County agrees to only use source code related to applications for which they own a license. There will be source from other applications in the archive.

1.8.4.3 County agrees that any unauthorized release of the source code will cause irreparable harm to Contractor. Therefore, County agrees to compensate Contractor for any and all damages Contractor suffers, to include reasonable attorney's fees, resulting directly or indirectly from, but not limited to, the mishandling, misuse, or theft of the source code, regardless of intent, or the absence thereof, by County, its employees, former employees, agents and third-party associates if so ordered by the court. Notwithstanding the foregoing, County agrees that Contractor is entitled to an immediate injunction to stop any further alleged or actual disclosure.

1.8.4.4 No license under any trademark, patent, copyright, or any other intellectual property right, is either granted or implied by the disclosure of the source code to County. Contractor's disclosure of the source code to County shall not constitute any representation, warranty, assurance, guarantee or inducement by Contractor to County of any kind, and, in particular, with respect to the non-infringement of trademarks, patents, copyrights, or any other intellectual property rights, or other rights of third persons or of Contractor.

1.8.4.5 Contractor will not be responsible for maintaining the source code. Furthermore, Contractor will not be liable for any consequences related to the use of source code modified by County.

## 2 PART TWO, STATEMENT OF REQUIREMENTS:

### 2.1 COUNTY REQUIREMENTS:

#### 2.1.1 MUTUAL UNDERSTANDING OF REVISION

The parties agree that the requirements herein listed are subject to change and/or modification based on the following criteria:

- unilateral business decision of the County to not pursue a particular functionality;
- mutual decision of the parties to not pursue a particular functionality;
- unilateral business decision of the County to delay the development or deployment of a particular functionality until a later date; or
- the findings of the fit gap process that substantially modify either the requirements or Scope of Work.

In any of the above instances, any change/modification/deletion/addition/replacement of any portion of the requirements or Scope of Services shall solely be documented and agreed to by a bi-laterally executed Contract Amendment as described in Exhibit A, Part 1, Section 1.3.

#### 2.1.2 GENERAL FUNCTIONAL REQUIREMENTS

The Solution shall have all of the following general functional capabilities. These capabilities should be available to fully perform across all application functional areas of the Solution; be configurable; and be operable by trained County employees.

The Solution shall comply with all applicable State of Arizona and Maricopa County Laws, and all applicable International Association of Assessing Officers (IAAO) standards, but specifically those listed below:

- Standard on Automated Valuation Models
- Standard on the Mass Appraisal of Real Property
- Standard on the Valuation of Personal Property

Detailed descriptions of County requirements are also included in Appendix 1, Functional and Technical Requirements.

**2.1.2.1 Configurable Workflow**

The System shall include the ability to configure workflows to support unique, high-use, repeatable activities such as are found with the appeals, permit intake, or notice-of-claim processes. The workflow should aid in tasks such as: navigate the user through the proper screens; move the work-step to supervisory users for approval; and aid in the completion of queued work items (e.g., an appeal). A task in a given workflow can have a duration set such that a secondary action (e.g., notify the supervisor) is taken after the set duration is exceeded.

**2.1.2.2 Notifications**

The System shall include the ability to configure email to send notifications from the system, or a specific system notification that an action is pending or that an action should be taken. The System may have a “notification area” or feature where specific notifications occur. These should be configurable and may work in conjunction with Workflow.

Example: An appeal recommendation requires approval by the Chief Appraiser, and since he is an occasional user of the system, an email is sent notifying him of the task.

**2.1.2.3 Alerts**

The System shall include the ability to set a feature to “watch” for a given data characteristic to change and then notify the user that such a condition exists. Alerts may work in a manner similar to, or in conjunction with, Notifications.

Example: A given property has a violent dog, and that information needs to be alerted to an appraiser who is preparing to make a field visit.

**2.1.2.4 Security**

The System shall have completely configurable role-based security that operates at the database level and controls user access to all data across all interfaces and output: screens, fields, reports, dashboards, simple query tools, menus, administrative tools, etc.

The System shall have the ability to restrict access to sensitive data such as address information for law enforcement personnel or elected officials.

**2.1.2.5 Simple Query Capability**

The System shall include the ability for the user to define un-joined data selection criteria and return results to an online interface or export the data to a delimited file or Microsoft Excel.

**2.1.2.6 Dashboard**

The System shall include the ability to create graphical and tabular reports and make them available for interaction with authorized users. The report can be inspected by drilling down to better understand the source data.

**2.1.2.7 Complex Reporting**

The System shall include the ability to create new reports using a report construction tool that allows for the creation and execution of complex queries, output formatting, and application of security. The new reports can be made available to specified user groups or be kept available to a single user.

**2.1.2.8 Letter Generation**

The System shall include the ability to merge selected data into a predefined report (defined letter) for the purposes of email or paper letter distribution to County taxpayers. The letter may be easily modified by persons with appropriate authorization. This functionality will interact with the configurable workflow function.

**2.1.2.9 Import/Export Tool**

The System shall include the ability to configure and re-use data import and export “routines.” The format for import or export can be one of several standards (e.g., CSV, delimited, fixed-width, xml).

**2.1.2.10 Online Personal Property Inventory**

The System shall include the ability to support, in a secure portal, the submission of personal property inventory and related ownership and location information. The portal submission process shall allow Personal Property taxpayers full ability to submit, modify, and confirm their annual personal property inventory for all properties owned.

**2.1.2.11 Web Portal Customer**

The System shall include the ability for a citizen customer to access a publicly available, open website, with integrated GIS and property data available, with the following features and information available. The Assessor’s current GIS shall be the primary point of entry for parcel searches; however, the System shall provide the data that is presented to the website user and allow for tabular data return in addition to integration with the GIS.

- Parcel search, by the following at a minimum:
  - Parcel or Account Number
  - Owner or Business Name
  - Address
  - Subdivision
  - MCR Number
  - City or Zip Code
  - Section, Township, Range
  - Mobile Home VIN or Address
- Complete property characteristics of both the land and improvements
- Complete ownership data including name/business name, address, VIN for mobile homes
- Value of both land and improvements, by parcel, with history showing current and past five (5) changes in value
- Rental property searches returning data in a manner similar to above

2.1.2.12 API

A fully documented Application Programming Interface (API) or similar shall be available for use by other organizations that may be required to interface with the System. Full publication of the API is preferred.

The API will support full featured use of objects, routines, language libraries, etc., as dictated by the technology inherent in the System, and shall be architected using a standard, industry-accepted Service Oriented Architecture (SOA) technology that is easily consumed by other organizations.

2.1.2.13 Audit Trail

The System shall include a feature that allows the County to track changes to individual data elements. Based on configuration and activation, the feature will show the data value before and after the change; when the change occurred; and which user made the change. The changes shall be available online and in paper report form.

2.1.2.14 Desktop Appraisal

The System shall include the ability to use County-purchased and -provided oblique imagery (currently Pictometry Connect V1) to perform follow-up appraisals to all real property. Primarily, this requires total integration with GIS and Pictometry in all System areas where imagery inspection could a) prompt a change/potential change in the real property characteristics or b) initiate an action for the appraiser (e.g., field visit or Notice of Change processes, etc.).

2.1.2.15 Reminders

The System shall include the ability for an individual user to set a reminder to perform an action at some future date/time. Reminders may record the context in which they are created (e.g., when the business context is a parcel, the parcel number and owner's name is stored with the reminder.).

2.1.2.16 Work Management

The ability to assign work to a workgroup, specific individual, or to a queue is needed to support high-use, repeatable activities such as are found with the appeals, permit intake, or notice-of-claim processes. This requirement extends workflow functionality to include the ability to schedule work, monitor progress, look up status of a given work item, utilize work templates, and manage work queues. Scheduling work to groups or individuals is needed by geographic area, work type, and as restricted by employee skill set.

2.1.2.17 Case Management

The System shall include a configurable feature that supports the management of an issue (case) interactively over an indefinite period of time. Data on the case is stored as a "header," and time/date stamped notes and data changes are stored as child records to the case. Cases shall interact with the workflow tool. Cases may be opened against any of the following: appeal, litigation, Notice of Claim/Change/Error (or similar), any parcel, any owner, or split. Cases for each of the types listed here may contain different data elements and use different work flows.

#### 2.1.2.18 Modeling

The System will use a third-party statistical software application (currently IBM's SPSS) to support all mathematical/regression analysis needed to support all automated valuation models (AVM). The AVMs will be used by the CAMA software to produce the values for each parcel in the model.

Model methods shall include the following:

- Cost approach, specifically the calibration of location modifiers and depreciation tables
- Comparable sales approach
- Direct market approach using any formula structure deemed necessary by the jurisdiction
- Income approach, which may include vacancy, expense, direct capitalization, gross rent or net rent models, or any combination of these models

Each model will be completely configurable by designated Assessor employees using: property types/classifications, specified property characteristics & condition(s), selected sales data, and valuation approach (cost, income, sales).

Models will support stratification based on any data characteristic or combination of data relationships as deemed necessary by the jurisdiction. This stratification may include but is not limited to:

- Property type
- Physical characteristics
- Geographic location
- Broad value ranges

The System shall have the capability to use regression model syntax to conduct the following:

- Change a given property characteristic (physical, type, or even location) and calculate a new value for use in setting noticed value
- Conduct "what if" analysis on a given property or group of properties to determine how characteristic changes may impact the value—results are not used to change noticed value

Options for managing the model syntax are included in Appendix 3.C.8.

#### 2.1.2.19 Mobile Computing

The System shall include the ability to take a mobile computing device to the field and create/update sketches; add/update property and ownership information; add/update personal property; make notes regarding any cases or other work being managed; and then return to the office and synchronize the device to the primary server for data transfer. GIS Parcel data shall be visible and usable on the mobile device.

### 2.1.3 MAJOR BUSINESS AREAS

The following list shows the Assessor department major business areas and specific processes in scope for the System. Some of the areas listed include multiple processes and some areas support both real and personal property.

<ul style="list-style-type: none"> <li>• Residential appraisal-CAMA, various models using sales comparison approach</li> <li>• Residential appraisal-CAMA, various models using sub-division model variants</li> <li>• Commercial appraisal-CAMA, various models or manual analysis, using all three approaches</li> <li>• Industrial appraisal-manual analysis using all three approaches</li> <li>• Land appraisal-manual analysis using all three approaches</li> <li>• Rule A, limited property value, valuation method</li> <li>• Rule B, limited property value, valuation method</li> <li>• Proposition 117</li> <li>• Audit process for any appraised real or personal property</li> <li>• Land appraisal-manual analysis using all three approaches</li> <li>• Personal property tax, business self-reporting, electronic submission and paper form</li> <li>• Personal property tax, audit process per Arizona Revised Statutes</li> <li>• Maintain real property characteristics—all types &amp; variants</li> <li>• Maintain ownership characteristics—all real and personal property</li> <li>• Maintain market areas</li> <li>• Maintain regression models</li> <li>• Maintain affidavit of affixture</li> </ul>	<ul style="list-style-type: none"> <li>• Manage resolutions</li> <li>• Maintain sales data, all real property</li> <li>• Maintain Property Use Codes (PUC)</li> <li>• Conduct real property canvassing</li> <li>• Manage valuation appeals, real and personal, County Assessor Level</li> <li>• Manage valuation appeals, real and personal, State Board Level</li> <li>• Manage litigation</li> <li>• Create/maintain property sketches</li> <li>• Desktop appraisal, real property only—all types</li> <li>• Conduct field inspections/re-visits, real and personal property</li> <li>• Valuation change process (taxpayer or Assessor initiated)</li> <li>• Manage the exemption process</li> <li>• Conduct real property parcel splits/combines</li> <li>• Maintain deeds</li> <li>• Verify/maintain legal classes</li> <li>• Import &amp; manage new construction permits, all jurisdictions</li> <li>• Manage notice of claims/proposed corrections</li> <li>• Project tax revenues based on current and projected values and growth</li> <li>• Enter/maintain employee time within workflow</li> <li>• Enter/maintain employee expenses within workflow</li> </ul>
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2.1.4 ARIZONA REVISED STATUTES

The System shall comply with all Arizona laws addressing real and personal property valuation and taxation. The Arizona law can be found in mainly Arizona Revised Statute (ARS) Title 42, with specific law applicable to the System found in Chapters 11 through 19. Links to the law are provided below, and specific interpretation to key elements of the law (Limited Property Valuation (LPV); and Full Cash Valuation (FCV) are shown below, as well.

ARS Title 42: <http://www.azleg.gov/ArizonaRevisedStatutes.asp?Title=42>

LPV: <http://www.azleg.gov/FormatDocument.asp?inDoc=/ars/42/13301.htm&Title=42&DocType=ARS>

Property Tax: <http://www.azdor.gov/PropertyTax.aspx>

2.1.4.1 Definitions:

2.1.4.1.1 **Full Cash Value (FCV)** for property tax purposes means the value determined as prescribed by statute. If no statutory method is prescribed, FCV is synonymous with market value, which means the estimate of value that is derived annually by using standard appraisal methods and techniques. FCV is the basis for assessing, fixing, determining and levying secondary property taxes. FCV shall not be greater than market value regardless of the method prescribed to determine value for property tax purposes.

2.1.4.1.2 **Limited Property Value (LPV)** means the value determined pursuant to section 42-13301. LPV is the basis for:

2.1.4.1.2.1 Computing levy limitations for counties, cities, towns and community college districts

2.1.4.1.2.2 Assessing, fixing, determining and levying primary property taxes

2.1.4.1.3 LPV—Use and Interpretation at Maricopa County

2.1.4.1.3.1 LPV—Application of Concept

The purpose of the LPV is to create a hedge against inflationary increases in the market value of the property. The calculations, by law, limit the amount of increase that can occur from one year to the next. LPV is the value used against the Primary Tax Rate, which is the larger of the two tax rates (Primary Tax rate and Secondary Tax Rate).

The LPV is determined by law. Arizona State Statutes provide the formulas to be used in calculating the LPV (see Arizona Revised Statutes §§ 42-13301 through 13304), which are referred to as Rule A or Rule B calculations.

*Rule A:*

Historically (prior to tax year 2015), for real property, the LPV will increase by either 10% over the prior year's LPV, or 25% of the difference between the prior year's LPV and the current year's FCV then added back to the proper year's LPV. The highest value calculated out of these two formulas is the one used. The LPV can equal the FCV but never exceed it. Therefore if either of the calculations exceeds the FCV, then the LPV will equal the FCV.

*Rule B:*

One exception to the calculation of the LPV is if there has been a major change (new improvements, demolition, change in land size, new parcel number) or a change in use of the property. In these instances, the LPV is established by the relationship (percentage) of FCV to LPV of all other existing properties within the same legal classification. The Rule B Calculation for legal class 3 property for tax year 2012 is 100% of the FCV in Maricopa County. This percentage can change from year to year (many years it is below 100%). It is set annually by determining what the average percentage difference is between the FCV and LPV of all existing property in Maricopa County. This is done separately for each legal classification. Therefore, there can be a difference in the Rule B percentage between different legal classifications.

## 2.1.5 DATA MIGRATION

Contractor shall migrate data in accordance with the description included in Exhibit A, Part 3, Track 7. The baseline data is described in Appendix 3, Part A

## 2.1.6 REPORTING

### 2.1.6.1 Mandated Requirements

2.1.6.1.1 The System shall provide all required functionality to produce the Annual State Abstract report in Excel format as described by the State of Arizona. At a high level, said report shall include:

2.1.6.1.1.1 List taxing authorities, along with valuation information, exempt amounts, and parcel counts,

2.1.6.1.1.2 List current tax areas, along with valuation information, exempt amounts, and parcel counts,

2.1.6.1.1.3 List legal classifications, along with valuation information, exempt amounts, and parcel counts,

2.1.6.1.1.4 List taxing authorities within legal classifications, along with valuation information, exempt amounts, and parcel counts, and

2.1.6.1.1.5 List of CVP/Local Assessed Properties taxing authorities with legal classifications, along with valuation information, exempt amounts and parcel counts.

2.1.6.1.2 A listing of reports is contained within Appendix 3, Part B.

## 2.1.7 INTEGRATION

2.1.7.1 The following software products shall be integrated into the System with the requirement that said integrations shall function as a single unit to the end user and not require periodic data transfers or transformations. A further listing of all integrations is contained in Appendix 3, Part C.

### 2.1.7.1.1 GIS/Pictometry

The ability to view all geospatial data, as contained in the Assessor's enterprise ESRI GIS and Pictometry imagery, using the parcel or improvement context provided by the CAMA software application. No additional querying of the GIS or Pictometry is required. Basic geospatial viewing functionality shall be available to the user: pan, zoom, use of identify feature, full use of oblique imagery for Pictometry, etc.

No data exchange will take place, only utilization of GIS & Pictometry functionality as part of the System will occur.

### 2.1.7.1.2 Apex Sketch Pro

The ability, in the office or field, to use the Apex drawing client to draw improvement boundaries and make notes to sketch areas and save the sketches and update the appropriate data fields in the CAMA software application. Data such as total square feet are updated in the CAMA software from Apex.

The sketch shall be visible without user action on all primary property improvement characteristic screens.

Data will flow from Apex to the CAMA software application.

Current Version: Apex Sketch Pro V5

#### 2.1.7.1.3 Marshall & Swift Cost Tables

The System shall utilize the residential and commercial cost tables and updates provided by Marshall & Swift to complete any valuation where the cost method is used. No additional action by the user shall be required to cause the System to function properly and complete the valuation.

The Marshall & Swift Segregated Cost engine utilized by the Assessor's Office is specific to Maricopa County. It comprises a set of SQL Server tables which are installed on a local server and which contain all the components and their data for Arizona. Maricopa County receives a Cost Calculation Engine that is installed on the same server as the SQL Server database. Maricopa County utilizes the segregated cost system. Maricopa County passes all cost valuation requests to this engine which calculates the appropriate values and passes these values back to us. Maricopa County does not have the ability to see inside the engine, or to see what the valuation information is without make a valuation request of the engine itself.

Maricopa County passes this calculation engine an .xml file in the format and with the data designated by Marshall & Swift. This xml file is read by the calculation engine which calculates the appropriate values and returns to Maricopa County an .xml file with the valuation information. The file is then converted by the County for insertion into its current system.

Annually, the new cost data and calculation engine is received, the County passes its information for all cost properties to the engine and then takes the results and inserts them into the County's current system. On a daily basis, users can make single parcel valuation requests of the calculation engine and see updated valuation information.

Current Version: **MVP Segregated 8 Release 2.0.133** for Maricopa County, AZ for Microsoft SQL Server **2000/2005 Calculation Engine: v.2.0.3093**  
Cost Date 2<sup>nd</sup> Quarter 2013 (June)

#### 2.1.7.1.4 Assessment Analyst

Esri Canada's Assessment Analyst shall serve functionally as an alternate user interface to the Contractor database and Apex sketch files, though AA's own database may serve as an intermediary depending on technical considerations for the data life cycle between AA and Contractor. Property component changes made through AA will be stored and retrieved within Contractor with real-time integration.

#### 2.1.7.1.5 Outlook

The System shall automatically send emails, where configuration allows, from the context of the System to either stored email addresses or to an ad hoc address entered by the user.

Data shall flow from the System to the Outlook client.

### 2.1.7.2 External Data Integrations

The following software products shall be integrated with the System, but are not required to behave as a single unit within the System.

#### 2.1.7.2.1 SPSS

The System shall provide the ability to use SPSS to perform all statistical calculation and regression analysis in support of the creation of all valuation models.

Sales and property characteristics will flow to SPSS., and the model syntax will be made available in the System through one of the options indicated in Appendix 3.C.8.

Current Version: SPSS V21

#### 2.1.7.2.2 OnBase: Electronic Document Management Solution

The ability to operate the Assessor's current document management software from the System is needed with the ability to set indices and classifications per the OnBase configuration. OnBase integration points are undetermined at this point and the scope of this integration is greatly dependent upon future business decisions and System capabilities. It is expected that context data will flow to OnBase for use in obtaining or storing the associated document.

Current Version: OnBase 10.0.1.109

### 2.1.7.3 Routine Imports and Exports

#### 2.1.7.3.1 Treasurer Data Exchange

The System shall allow for file exchanges between the Assessor and Treasurer offices for the following transfer situations:

2.1.7.3.1.1 **Resolutions:** Assessor enters resolutions in their system and prepares the files. These are picked up by the Treasurer. They then process the resolutions through their system. Treasurer then provides result files for the Assessor to pick up.

2.1.7.3.1.2 **Address changes.** Each week the Assessor creates a file of all address changes from our system and makes that file available to the Treasurer to update their system.

2.1.7.3.1.3 **Tax Roll.** Each year in August the Assessor make the tax roll available to the Treasurer. This file contains the data for all parcels and personal property accounts and is the basis for the Treasurer to calculate and generate the tax bills.

2.1.7.3.1.4 **Tax Files.** Each year after the tax bills are generated the Treasurer creates a tax file that contains the tax information for all properties. The Assessor uses this data for research and projection.

2.1.7.3.1.5 **Senior Value Protection.** Each year the Assessor provides the Treasurer a file of all parcels whose owner has qualified for valuation protection according to statute. The Treasurer uses this information to apply an elderly assistance credit to that homeowner.

2.1.7.3.2 Recorder Import

Import data as provided by the County Recorder’s Office representing parcel and record maintenance recordings. Volume is 1500 – 2000 records received on a daily basis. Data elements received include, but are not limited to, the following:

- Recording Number
- File date
- Date Transferred
- Parcel Number
- File Type (Splits/Combines, Deeds, Affidavits, Judgments, Plat Maps, etc.)

2.1.7.3.3 Permits

Import permit data as submitted by external agencies. Volume varies based on agencies. Process is performed in batch on a weekly basis and includes, but is not limited to, the following data elements:

- Parcel
- Owner
- Situs
- Builder
- Permit Status
- Type (new construction, additions, demos, etc.)
- Issue Date
- Job Descriptions
- Census Code

2.1.8 TRAINING

2.1.8.1 User Groups:

User Group to be Trained	# of Users
Administration	25
Valuation Modeling Unit	12
Mapping & Ownership	40
Information Services	24
Personal Property	21
Appraisal	179
Litigation	18
GIS Development	6
Outside Users	60
<b>TOTAL USERS TO TRAIN</b>	<b>385</b>

2.1.8.2 Facilities: The County shall provide an equipped training facility that is sufficient to train up to 24 individuals simultaneously.

2.1.8.3 County shall have the right to reproduce, edit, and distribute the training materials without limitation for internal training sessions involving internal or external end users. The County shall also have the right to record any classroom training.

2.1.8.4 Training shall be provided for all user applications, system management tools and technical areas, and shall be conducted to allow the business and technical users to become completely familiar with the System capabilities. During the project, the County may identify additional areas for which training may be required.

2.1.8.5 The Contractor shall be responsible for developing separate training plans for each major functional area, which must be presented to project manager, or designee for approval prior to class scheduling and commencement.

The following outlines the general responsibilities of the Contractor for training:

- The Contractor must assign a Training Facilitator to the project. This facilitator must supply the County's project manager or designee with various training plans as needed during the project to meet training needs consistent with the project's progress. Training plans must also include details on how training shall be coordinated for a large number of people.
- The Contractor shall provide complete and detailed training to the project team core group (up to 20 people) for all baseline software products, business process reengineering activities and change management methodologies. Training must address both functional and technical aspects of all of the products and methodologies. This early training is in preparation for the project team core group to gain the knowledge needed to successfully participate in the required aspects of the project.
- The Contractor must develop materials that include varying levels of user capabilities and functions. The Contractor must make available to the County the data files and (if necessary) software used for this effort. The County must be granted the right to use, modify and reproduce all training materials, as it deems appropriate during and after the project. All training materials must be reviewed and approved in writing by the County's project manager or designee prior to training commencement.
- The Contractor shall recommend a method for monitoring employee progress in the use of the System. Defined skill sets for each role should be measured to document progress.
- The County shall retain the soft copies of the materials used by the Contractor in order to provide additional training when appropriate. This data must include manuals and on-line self-service modules.
- All user and technical training must be conducted at County designated sites except where the County approves otherwise.
- The Contractor must supply a description of each course, objectives, pre-requisite skills and knowledge, target audience, course length and evaluation method used to ensure learning has occurred.
- The Contractor must recommend timing and objectives for a mentoring program or follow-up training in which classroom instruction is later reinforced during live use of the System.
- The Contractor must recommend the user-training environment including server specifications, operating system, workstation specifications, application requirements, etc.
- The Contractor must provide functional user and technical training for each functional area including menus, interface capabilities, edits, and ad-hoc reporting, and analysis tools.
- The System must include context-sensitive help in the user interface. The help files must accurately describe custom functionality developed for the County and link to online tutorials where appropriate.
- The Contractor must provide on-line training tutorials for each functional area.

- If applicable, the Contractor shall identify training needs for all technical tools being proposed. The Contractor shall be responsible to provide all technical training related to these tools. This includes development tools, RDBMS tools, business intelligence platforms, system management tools, and system administration tools.



# STATEMENT OF WORK

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EXHIBIT A, PART THREE TO THE  
CONTRACT PURSUANT TO RFP  
BETWEEN  
VISION GOVERNMENT SOLUTIONS, INC.  
AND  
MARICOPA COUNTY, ARIZONA  
SERIAL 13129-RFP

Maricopa County  
320 West Lincoln Street  
Phoenix, AZ 85003-2494

Vision Government Solutions  
44 Bearfoot Road  
Northborough, MA 01532

**INTRODUCTION TO STATEMENT OF WORK (SOW)**

- TASK 1.1. Scope of Work Support Documents (Appendix 3)
- TASK 1.2. Goals and Objectives
- TASK 1.3. Functional Areas

**TRACK 2. PROJECT MANAGEMENT**

- TASK 2.1. Project Roles
- TASK 2.2. Assumptions
- TASK 2.3. General Management
- TASK 2.4. General Responsibilities, Contractor and County
- TASK 2.5. Review of Contractor Deliverables

**TRACK 3. PROJECT PLANNING**

- TASK 3.1. Project Preparation
- TASK 3.2. Project Kickoff
- TASK 3.3. Review/Revise Project Schedule

**TRACK 4. HARDWARE & SOFTWARE INSTALLATION**

- TASK 4.1. Confirm the Recommended Server Hardware
- TASK 4.2. Order & Receive Hardware OS and Database Software
- TASK 4.3. Install, Test and Validate Server, OS, Database and Software
- TASK 4.4. Desktop Deployment (Contractor to determine if needed)
- TASK 4.5. Track Acceptance

**TRACK 5. GAP ANALYSIS**

- TASK 5.1. Gap Coordination
- TASK 5.2. Gap Analysis Workshop
- TASK 5.3. Draft Gap Analysis Document (GAD)
- TASK 5.4. Final Gap Analysis Document (GAD)
- TASK 5.5. Track Acceptance (Decision to move to next phase)

**TRACK 6. DESIGN**

- TASK 6.1. Create Preliminary Use Cases
- TASK 6.2. Revise Use Cases
- TASK 6.3. Development Decision
- TASK 6.4. Track Acceptance

**TRACK 7. DATA MIGRATION**

- TASK 7.1. Data Migration Plan
- TASK 7.2. Data Migration Preparation and Data Mapping
- TASK 7.3. Iteration 1: Prototyping
- TASK 7.4. Data Clean-Up
- TASK 7.5. Iteration 2: Full Data Set
- TASK 7.6. Iteration 3: User Acceptance Delivery
- TASK 7.7. Go-Live Data Migration Planning
- TASK 7.8. Iteration 4: Final Migration
- TASK 7.9. Track Acceptance

**TRACK 8. DEVELOPMENT**

- TASK 8.1. Create New Applications & Software Configuration
- TASK 8.2. In-Process Review Sessions
- TASK 8.3. Deliver/Install New Software Versions, Enhancements and Patches

- TASK 8.4. Conduct New Software, Enhancements and Patch Testing
- TASK 8.5. Revise Software/Correct Software Defects
- TASK 8.6. Track Acceptance

**TRACK 9. TRAINING**

- TASK 9.1. Training Analysis & Planning
- TASK 9.2. Training Material Development
- TASK 9.3. Conduct Training
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**TRACK 10. SYSTEM TESTING**

- TASK 10.1. Create Test Plan
- TASK 10.2. Create Test Scripts
- TASK 10.3. Conduct Testing
- TASK 10.4. Revise/Correct Defects
- TASK 10.5. Track Acceptance

**TRACK 11. GO-LIVE**

- TASK 11.1. Develop Go-Live Plan
- TASK 11.2. Go-Live Event
- TASK 11.3. Track Acceptance

**TRACK 12. TRANSITION**

- TASK 12.1. Remedy Defects
- TASK 12.2. System Acceptance / Transition to Support
- TASK 12.3. Retained Funds Release Milestones

## Introduction to Statement of Work (SOW)

This document contains the overall Maricopa Assessment Replacement System (MARS) approach and Statement of Work (SOW) for the planning, gap analysis, data migration, custom programming, training, and Go-Live project activities.

The SOW is an Exhibit to the contract Pursuant to RFP (Contract) signed by Vision Government Solutions, Inc., herein referred to as ‘Contractor’, and Maricopa County, herein referred to as ‘County’, and all actions directed herein shall be performed in accordance with the Professional Services Agreement.

Appendix 1 – Functional and Technical Requirement Matrix is herein incorporated into this section. Contractor shall be responsible for the provision of the requirements as described within the matrix. During the development phase of this SOW, the parties may elect to remove and or enhance any requirements as mutually agreed to by the parties as described in section 1.3 of this Exhibit A.

Project requirements or services not explicitly included in the Contract and SOW, or included in documents not specifically referenced in the Contract or SOW, will be considered out-of-scope, and will be handled through the change control process.

## Software Description

The Software is the Vision Government Solutions, Inc., Windows-based computer-aided mass appraisal (CAMA) software, *Appraisal Vision™ V7*. The software elements included are designed for real estate valuation including, cost and comparison sales, data maintenance, sales analysis, reporting and query, image display, personal property valuation, and income capitalization. This software will be implemented to support the maintenance and enhancement of real and personal property records to effectively administer all laws and regulations for Maricopa County property owners so that all ad valorem property is fairly and equitably valued.

### TASK 1.1. Scope of Work Support Documents (Appendix 3)

1. **A – Data Migration Assumption and Acceptance Criteria:** This document states the beginning data migration assumption in terms of quantity and source, and lists the acceptance criteria for the migration effort. This document will be replaced by the Data Migration Plan produced as part of the Data Migration Track.
2. **B – Report Assumptions:** the County expects that certain required reports will be created as part of this SOW, with a defined set to be available at the Go-Live Date. This work may be accomplished as part of the project tasking. County and Contractor, during the Gap Analysis, will review and refine the list provided in the attachment and will determine respective responsibilities for any effort that is needed.
3. **C – Integration Assumptions:** The County expects that a number of third-party software applications will be integrated into the System. This attachment lists the initial integration assumptions, and provides an initial, limited definition of the integration.
4. **D – New Functionality:** This attachment outlines the planned, functional improvement to the System as identified in the procurement process. Other improvements may be identified as implementation progresses.
5. **E – Deliverable Acceptance Statement Form:** This template functions as the formal sign-off mechanism for individual Deliverables as identified in this SOW.
6. **F – No Cost Task Modification Form:** This template documents any measurable change in scope which DOES NOT result in a change in cost to the Contract. This documentation process ensures complete communication between the County and Contractor and may be used to reduce or increase the scope of a given Deliverable, Task, or System component.
7. **G – Form of Change Order:** This template documents any measurable change in scope which DOES result in a change in cost to the Contract.

**TASK 1.2. Goals and Objectives**

1.2.1. General Goals and Objectives

1. Improve appraisal services to the people of Maricopa County through the following:
  - a. Accurate and justifiable property values
  - b. Superior customer service and accountability
2. Improve exchange of data with other government entities
3. Improve office productivity
4. Stabilize workforce culture and improve institutional knowledge
  - a. Implement standard policies and procedures
  - b. Knowledge and skills
  - c. Workforce integration/communication
5. Respond to changes in laws, regulations, and policy in a complete, accurate, and timely manner
6. Reduce risk associated with custom and/or unsupported technology

**TASK 1.3. Functional Areas**

1.3.1 The following is provided as a summary of the functional areas to be addressed in this SOW. This list shall serve as a checklist to be used at the beginning of a Task to ensure that all business areas are addressed during the execution of that Task. For instance, when conducting the Gap Analysis workshop, each of the major functional areas below should be discussed, along with each and every sub-process that is deemed to be supported by the System.

1. Legislative Mandated Processes
2. Enter/maintain employee time within workflow
3. Audit for any appraised real or personal property
4. Maintain affidavit of affixture
5. Personal property appraisal, business self-reporting, electronic submission and paper form
6. Personal property appraisal, audit process per Arizona Revised Statutes
7. Personal Property Appraisal
8. Commercial Appraisal
9. Industrial appraisal-manual analysis using all three approaches
10. Land appraisal-manual analysis using all three approaches
11. Residential Appraisal
12. Maintain real property characteristics—all types & variants
13. Conduct real property canvassing
14. Create/maintain property sketches
15. Desktop appraisal, real property only—all types
16. Maintain Property Use Codes (PUC)
17. Conduct field inspections/re-visits, real and personal property
18. Import & manage new construction permits, all jurisdictions
19. Manage notice of claims/proposed corrections
20. Residential appraisal-CAMA, various models using sales comparison approach
21. Residential appraisal-CAMA, various models using sub-division model variants
22. Commercial appraisal-CAMA, various models or manual analysis, using all three approaches
23. Maintain market areas
24. Maintain regression models

25. Maintain sales data, all real property
26. Valuation Modeling
27. Exemptions
28. Annexations/Tax Area Code Maintenance
29. Notice of Change
30. Notice of Valuation
31. Maintain ownership characteristics—all real and personal property
32. Maintain deeds
33. Parcel Splits & Combines
34. State-mandated Reports
35. Tax Roll Processing
36. Manage resolutions
37. Manage valuation appeals, real and personal, County Assessor Level
38. Manage valuation appeals, real and personal, State Board Level
39. Manage litigation
40. Verify/maintain legal classes
41. Rule A, limited property value, valuation method
42. Rule B, limited property value, valuation method
43. Proposition 117
44. LPV Calculation
45. Valuation change process (taxpayer or Assessor initiated)
46. Project tax revenues based on current and projected values and growth
47. State Assessed Properties

**TRACK 2. Project Management**

**TASK 2.1. Project Roles**

2.1.1. Primary Contractor Stakeholders

1. Contractor Project Resources

Contractor will appoint a team of staff members for the duration of the project. The project team is composed of the following positions and responsibilities:

<b>Role</b>	<b>Responsibilities</b>
Contractor Project Sponsor	<ul style="list-style-type: none"> <li>- Support Contractor financial and resource commitments</li> <li>- Included on the Contractor change board for all cost and scope changes</li> </ul>
Contractor PM and Project Coordinator	<ul style="list-style-type: none"> <li>- Coordinates all project activities for all Contractor project staff</li> <li>- Works in close collaboration with County project management and County staff</li> <li>- Has overall responsibility for the execution of all Contractor tasking</li> <li>- Has primary responsibility for project management activities as defined in Track 2 Project Management</li> </ul>
Contractor Technical Services	<ul style="list-style-type: none"> <li>- Makes recommendations on system architecture – servers and subsystems</li> <li>- Assists in the resolution of technical networking and infrastructure system Issues</li> <li>- Responsible for developing architecture items – integration with next generation interface</li> <li>- Determines any needed 3rd party tools</li> <li>- Programs the migration scripts and code to transfer all pertinent information from legacy systems to the System’s database</li> <li>- Leads/assists in all data migration tasking</li> <li>- Verifies converted data and prepares database for data validation</li> </ul>
Business Analyst	<ul style="list-style-type: none"> <li>- Conducts Contractor tasking related to Gap Analysis, and supports the development of Work Orders</li> <li>- Assists with data migration tasks</li> <li>- Assists with all testing tasks</li> <li>- Supports all training and implementation support tasks</li> </ul>
Other Contractor Resources	<ul style="list-style-type: none"> <li>- Resources from other areas, including software engineering and product management, will be allocated to this project; however, they will not be visible participants on the project team.</li> </ul>

2. Contractor Resources assigned to the project are as follows:

- Executive Sponsor: Cynthia Williamson (key person)
- Project Manager: Kristen O’Connor (key person)
- Senior Business Analyst: Charlie O’Shea (key person)
- Senior Supporting Business Analyst: To be determined in the Project Charter (deliverable D4).
- Senior Technical Lead: To be determined in the Project Charter (deliverable D4).
- Management Level Technical Sponsors: Steven Tucker (key person)
- Technical Lead: To be determined in the Project Charter (deliverable D4).

2.1.2. Primary County Stakeholders

1. County Project Resources

The County will appoint a team of staff members for the duration of the project. The project team is composed of the following positions and responsibilities:

<b>Role</b>	<b>Responsibilities</b>
Executive Sponsor	- Overall project owner and champion
Executive Steering Committee	- Advisory group comprising the major customers of the Office of the Assessor plus the County Office of Enterprise Technology
Policy Team	- Primary decision making body - Approves any changes to plan, scope, or timeline - Works with project manager to resolve project issues - Evaluate project and System-related alternatives which have potential impact on County and business operations. - Empowered to make policy decisions on behalf of Assessor’s Office - Escalates issues to other County departments as appropriate (eg. interface definition or alignment of business rules)
County Project Manager	- Review and approve all project deliverables - Provide overall project oversight and coordinate with business offices - Expedite business and functional decision-making to ensure technical development progress and completion - Escalate issues to Steering Committee when necessary - Report on project status to key groups and individuals (Sponsor, Steering Committee, etc.) - Measure the performance of the project
Project Team	- Complete individual tasks required to deliver the project - Participate in analysis, requirement gathering, & preparation of specifications - Provide business expertise regarding processes and system design - Identify reporting requirements - Identify security/ access requirements - Identify and define improvement opportunities - Facilitate data cleansing and migration to the System load tables - Identify department-specific requirements - Provide System testing support

**TASK 2.2. Assumptions**

It is assumed that:

1. County will reasonably make resources available to assist with all project activities. The County will make County project team members available for meetings, discussions and conference calls upon request by Contractor. Contractor will identify when information is needed and the County’s PM will confirm the availability of County resources to meet that timeframe or negotiate an alternative timeframe, to minimize delays in the project.
2. All Onsite visits will be coordinated between the Contractor and County PMs.
3. County and Contractor, when appropriate, shall consider alternative meeting options to Onsite visits, subject to approval, such as web meetings, remote desktop and conference calls. Making use of this technology will help in reducing travel costs.
4. An adequate number of qualified staff with the appropriate skills and experience will be furnished by Contractor and the County for each meeting, analytical session, or other review activity, whether Onsite or Remote.

5. The County will provide an adequate workspace for each Onsite Contractor consultant, with access to a desktop workstation, network, telephone and close proximity to the County project team. Adequate breakout and conference space will also be provided.
6. All software, data, and other project Issues or Defects found—whether by Contractor or the County—will be logged into the Project Tracking System (PTS). PTS tracking reports will be made available to the County and will record the Defect or Issue, resolution (and proposed resolutions, if desired), and acceptance by County staff.

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**TASK 2.3. General Management**

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**2.3.1. Project Management Web Portal**

A project management web site (PTS) shall be provided by Contractor for the purposes of staging all project documents, posting project plans, managing issues, tracking changes, and to be used as needed to communicate and manage all tasking within this SOW. Large Deliverables, such as migrated data, software, and the like, will be delivered using other mutually acceptable means. The web site shall be secured and accessible by anyone with proper security credentials.

**2.3.2. Issue Management**

The Issue Management process ensures that each Issue identified within the project environment is documented, prioritized and resolved within an appropriate timeframe.

**1. Issue Identification**

Once the Contractor PM or the County PM identifies an Issue, according to the description above, the Issue will be tracked in the PTS.

**2. Issue Review**

The PTS will be reviewed by the PMs and project staff in status meetings and a course of action and an owner will be determined for each Issue.

**3. Implement Issue actions through completion.**

The Issue is tracked through resolution and closed when complete.

**2.3.3. Communication Management Plan**

The following strategies have been established to promote effective communication within and about this project.

**1. Project Management Meetings**

Ad-hoc or regularly scheduled meetings will be hosted by Contractor via web conferencing, Onsite, or as a teleconference, as shown below. In general, Contractor will be responsible for producing agendas and documenting the results of the meetings shown below. Both PMs shall have the responsibility to schedule and communicate with their respective teams, and provide the necessary support materials.

Meeting Type	Purpose	Attendees	Frequency	Results
Weekly Planning & Status	Communicate project status, resolve issues, assign resources, and plan project activities.	PMs, County Procurement Officer, SMEs as needed	Weekly-web	Minutes will be recorded and posted to the PTS
Executive Steering Committee	Provide high level project tasking status; budget status; and communicate the six-month tasking plan.	Executive Steering Committee, Policy Team, Contractor Sponsor, PMs, County Procurement Officer	Quarterly-Onsite	Minutes will be recorded and posted to the PTS
Sponsors	Confidential meeting to address major project threats; personnel issues, budget status, and other senior management level discussions as needed.	Contractor & County Sponsors, PMs, County Procurement Officer Policy Team as desired	Monthly-Onsite	Minutes will be recorded by the County PM, and retained for exclusive use by the Sponsors.

Policy Team	Resolve business policy issues; communicate status; provide business guidance on near term project tasking	County Policy Team	Monthly-Onsite. More frequently as needed.	Minutes will be recorded and posted to the PTS
Ad hoc Issue	Resolve detailed issues, produce Deliverables, and communicate as needed to support project tasking	Team leads, PMs, SMEs, and others as needed	Ad hoc	Results shall be communicated to the PMs by a designated participant. If a PM is present, the PM shall prepare the results.

2. Status reports

The Contractor PM will provide a written detailed status report at least twice monthly including at a minimum:

- Tasks worked on during this week’s period indicating status against latest approved schedule
- Tasks planned to be worked on during upcoming week
- Tasks planned to be started the week after next
- Open issue summary
- Key discussions for next project status meeting
- Change orders
- Risk management
- Outstanding invoices
- Other comments

A single electronic copy of each status report will be sent via email to the County PM.

2.3.4. Risk Management

Contractor and the County acknowledge that risks exist and may impose a negative impact on the project in scope, cost or time. We agree as a team to address each risk in advance if we are able, or otherwise to come together in mutual agreement and collaboration to deal with each situation as it arises. The Risk Register will be posted on PTS with updates provided to County at status meetings. At a minimum, the Risk Register will capture the following:

- Date identified
- Internal vs. External Risk

- Author (person reporting risk)
- Description of risk and its potential impact upon the project
- Likelihood (high, medium, low)
- Severity (high, medium, low)
- Description of mitigation approach
- Status (open, closed)

2.3.5. Defect Tracking

Defect identification, documentation, and resolution is an inherent component of solution testing. The following represents the approach for managing, evaluating, and prioritizing these Defects.

Defects will be tracked using PTS. At a minimum the following parameters will be captured for each Defect logged.

- Defect ID
- Severity (see levels below)
- Author (person reporting the Defect)
- Date Identified
- Owner
- Resolution Date
- Resolved By
- Status (open, closed)

**Severity Levels:** Severity represents the impact of the Defect on the system and associated business processes. The definition for each severity level is described below. The level will be set jointly by Contractor and County project teams in consideration of the guidelines below.

CLASSIFICATION	SYSTEM DEFINITION	PROJECT DEFINITION/GUIDELINES
<b>SEV1</b>	Prevents critical business process from functioning or causes data corruption. Legislative related or deadline oriented. No workaround exists.	<ul style="list-style-type: none"> <li>✓ Fix needed immediately and expected within 1 business day from the Contractor.</li> <li>✓ Other tasking is stalled and is dependent on effective resolution.</li> </ul>
<b>SEV2</b>	Prevents or impedes non-critical business process from functioning. A non-reproducible issue that prevents a critical business process from functioning. A data-related issue that cannot be recreated at Contractor. An acceptable short-term work around exists.	<ul style="list-style-type: none"> <li>✓ Fix needed &lt;= 5 work days.</li> <li>✓ Other tasking is (or is about to be) stalled and is dependent on effective resolution.</li> </ul>
<b>SEV3</b>	Minor Defects. Prevents or impedes lower impact non-critical business processes. A lower impact customer-specific issue related to a customization for that customer.	<ul style="list-style-type: none"> <li>✓ Fix needed &gt; 5 &lt; =10 work days.</li> <li>✓ Attention needed by next PM meeting.</li> <li>✓ Needs resolution to address a risk; research a project approach, or prevent a future project task delay, etc.</li> </ul>
<b>SEV4</b>	Flaws. Usability, training/how-to, or documentation issues. Any issue that has a non-intrusive long-term work around.	<ul style="list-style-type: none"> <li>✓ Fix may or may not be needed &gt; 10 work days.</li> <li>✓ May need Fix to address a risk; research a project approach; or prevent a future project task delay, etc.</li> </ul>

### **Total Software Score**

Total Software Score (TSS) is a formula that considers both number and severity of Defects. It will be used at various points during the project as an evaluation criterion, specifically for acceptance of software deliveries and final project acceptance. For each scenario, a TSS value will be identified which is allowable for Acceptance.

TSS is calculated by multiplying the severity count by the corresponding point value for the associated severity level. The point value for each level is indicated below:

- SEV1: 4 points
- SEV2: 3 points
- SEV3: 2 points
- SEV4: 0 points (largely cosmetic or desired future enhancements to functionality)

Example: If four (4) SEV3 and two SEV1 Defects are identified and unresolved, the TSS = 16 [(4x2)+(2x4)].

#### 2.3.6. Project Closure

##### 1. Administrative closure procedure

This process includes updating Contract records to reflect final results, and archiving that information for future use. This process should not be confused with the Tasks associated with Track 12.

##### **Contractor PM**

- Gather documentation (both paper and electronic) including, but not limited to, change orders, sign-off documents, meeting notes, timelines and lessons learned.
- Organize and store documentation according to internal processes.
- Supply any necessary copies of documentation to customer.
- Support customer's administrative closure procedures.

##### **County PM**

- Perform administrative closure procedures as dictated by their office.
- Support Contractor's administrative closure procedures.

##### 2. Contract closure procedure

This process includes activities needed to settle and close any Contract agreements as well as ensure all work is completed correctly and satisfactorily as per the Contract.

##### **Contractor PM**

- Send documentation to customer outlining completion of contracted products and services including related change orders.
- Notify customer of outstanding payments.
- Notify Contractor Accounting department to invoice for final payment.
- Hold internal hand-off meeting with Contractor Customer Service department.
- Hold meeting to introduce Contractor Account Manager to customer team.
- Hold lessons learned meeting with customer.

##### **County PM**

- Perform Contract closure procedures as dictated by their office.
- Support Contractor's Contract closure procedures.
- Support prompt payment of outstanding and final invoices.

2.3.7. Fixing Defects

Upon receiving notice of a Defect, the Contractor shall follow the procedure in 2.3.5 above, and provide a response to the County within a reasonable amount of time regarding the Contractor’s plan of how to resolve the Defect. Then the Contractor will provide to the County a Fix in accordance with that plan at which time the County will verify whether that the Fix has been made. Upon such verification the Defect will be considered resolved and removed from the calculation of the TSS.

**TASK 2.4. General Responsibilities, Contractor and County**

2.4.1. Contractor Responsibilities

The list below describes Contractor’s responsibilities that may not be listed elsewhere in this SOW, during the implementation of this project.

1. The Contractor PM will be the single point of contact and manage the activities of Contractor staff, as specified in this SOW.
2. Contractor will have responsibility for Contractor’s project tasks outlined in this SOW. Contractual and administrative communications will flow through the County PM and the Contractor PM. The Contractor PM will coordinate Contractor’s software configuration, software and integration development, testing and integration tasks, and will manage Contractor’s day-to-day technical activities related to implementation of the System.
3. The County calendar shall dictate the observed holidays. All direct communication between Contractor and the County personnel will be copied to the Contractor PM and the County PM and staff, as agreed upon.
4. Identify logistics needs for Onsite meetings to the County (conference room, projector, access to System, etc.).
5. Ensure Contractor communicates the desired County attendees for invitation in advance, and that Contractor is present, for all applicable meetings.
6. Provide an adequate number of copies of agendas, handouts and presentation handouts for any meeting that Contractor is leading (Onsite or Remote). If the meeting is to be conducted remotely, then only one electronic copy of any materials needs to be delivered, and copies will be made at County facilities as needed. Electronic files may be used in lieu of printed material.
7. Create, review, and update all documents within the timeframe specified in the review process for all draft documents.
8. Contractor will provide to the County, sixty (60) days in advance of desired initial installation date, all updated technical specifications and requirements related to infrastructure parameters and the Database Management Software (DBMS), remote access requirements, service release version, hardware and communication line requirements. Mutually agreeable notice will be provided for all other installation dates.

2.4.2. County Responsibilities

The list below describes County’s responsibilities that may not be listed elsewhere in this SOW, during the implementation of this project.

1. Make arrangements to satisfy Contractor’s requested logistics of all the Onsite meetings (conference room, projector, access to System, etc.).
2. Provide hardware for all software and data installations that have the requisite software, operating system, and other support components installed, based on Contractor’s specified requirements.
3. Ensure hardware, communication lines, related infrastructure parameters and the Database Management Software (DBMS) match the service release version, per Contractor’s requirement, and are installed properly and configured prior to installation of any Contractor software Deliverables.
4. Provide Remote access to the approved Contractor team members, consistent with County policy and where County agrees in advance to provide such connectivity.
5. Provide logistics for software installation on servers.
6. Review and provide feedback on all draft documents; in general, the County should attempt to provide feedback within five (5) Business Days of receiving the documents.

7. Provide office space and an internet connection for Contractor team members.
8. Provide County Business Calendar to Contractor.
9. Ensure County attendees are invited in advance and are present, or accounted for via a suitable replacement if necessary, for all applicable meetings.
10. Provide resources at the start of an Onsite visit by Contractor team for the installation of software needed for the visit. Contractor will identify resources needed and schedule all Onsite visits in advance.
11. Provide adequate departmental resources to support the project timeline while taking into consideration daily and periodic departmental work requirements.
12. Provide adequate facilities and equipment for training.
13. The County shall have responsibility for overall project management and will direct all County resources.
14. All direct communication between the County and Contractor personnel will be copied to the Contractor PM and the County PM and staff, as agreed upon.

**TASK 2.5. Review of Contractor Deliverables**

In general, all Contractor Deliverables shall be made ready after all related tasking is completed, and Contractor has communicated to the County, via email or paper correspondence, that the Deliverable is ready for review and Acceptance. Once notified, the County shall take all reasonable means to review the Deliverable in accordance with the criteria listed and timeframes in this SOW.

2.5.1. Review Periods (unless otherwise noted):

**Standard:** For Deliverables designated as “Standard”, the default review period will be five (5) County Business Days.

**Major:** For Deliverables designated as “Major”, the default review period will be ten (10) County Business Days.

**Exceptions:** If a review period has not been identified for a Deliverable, the parties will jointly determine the appropriate duration at the time of delivery to the County.

2.5.2. Deliverable Review Process:

Both parties will adhere to the following steps for Deliverable review and Acceptance:

1. Contractor completes the Deliverable and provides it, in the specified format, to the County PM with the Deliverable ID and description in the email subject line. If the Deliverable is such that it cannot be delivered via email, an email will be sent as described, indicating the mode of delivery.
2. Unless otherwise specified and agreed upon by both parties, the review period for all Deliverables is indicated in the Deliverable List. The review period begins the next Business Day following receipt of the Deliverable.
3. For certain activity-based Deliverables (testing, training, analysis workshops), the Deliverable cannot be considered submitted by Contractor until all related activities have concluded. For example, all Gap Analysis sessions must conclude before Contractor submits this Deliverable to the County for review. The parties may decide to split these activities by subject area (or other segment) in order to submit the Deliverable for review. The resulting segmentation should be reflected in the Schedule of Milestones and Payments (Exhibit B).
4. The County will use all reasonable efforts to review the Deliverables within the default review period, and assess the Deliverables to determine whether they conform in all material respects to the specifications (a walk-through can be requested to facilitate this). The County will inform Contractor in writing if this deadline will not be met and provide a new date.
5. In the event that the Deliverables are incomplete, unclear or deficient, the County will provide a detailed list in writing of the deficiencies and concerns.
6. Contractor will use all its reasonable efforts to provide a response resolving the deficiencies and/ or concerns within the default review period, starting with receipt of County’s written response. Contractor will inform the County in writing if this deadline will not be met and provide a new date.

7. County and Contractor may, by mutual written agreement, extend the review periods. However, all attempts should be made to adhere to the default review duration so that the overall project can remain on schedule. Failure to do this could result in a change order affecting schedule, cost and scope.
8. Contractor will provide Deliverables to County as they are developed.
9. In the event that the County does not provide written notification of its rejection or acceptance of a Deliverable within the agreed-upon review period, such Deliverable shall be deemed to be accepted by the County unless an extension is requested of, and accepted by, Contractor.
10. The County shall not unreasonably withhold its acceptance of Deliverables and will respect Contractor’s expectation to be compensated as defined in the Schedule of Milestones and Payments (Exhibit B) for the satisfactory completion of Deliverables.

**Contractor Deliverables Listing**

<b>ID</b>	<b>Description</b>	<b>Type</b>	<b>Review Iterations</b>
D1.	Kickoff meeting PowerPoint presentation	Standard	1
D2.	Project timeline	Standard	2
D3.	Kickoff meeting facilitation	Exception	0
D4.	Project charter and detailed timeline	Standard	1
D5.	Server, O/S and DBMS recommendations are provided to County.	Standard	0
D6.	PC/Laptop/Tablet configurations and master configuration dictionary/documentation	Standard	0
D7.	Track Acceptance form	Exception	0
D8.	Shell Gap Analysis Document (GAD)	Standard	1
D9.	Gap Analysis workshop completion	Exception	0
D10.	Documentation of Gap Analysis issues needing resolution	Standard	1
D11.	Draft Gap Analysis Document	Major	3
D12.	Final GAD delivered	Standard	1
D13.	Track Acceptance form	Exception	0
D14.	Preliminary Use Cases	Major	3
D15.	Revised Use Cases	Standard	1
D16.	Revised Development Plan with bid against Development Pool	Standard	1
D17.	Track Acceptance form	Exception	0
D18.	Data migration start (draft Data Migration Plan)	Major	3
D19.	Final Data Migration Plan	Standard	1
D20.	Updated Data Migration Plan, including data maps	Standard	1
D21.	Delivery of sample migration	Exception	
D22.	Data clean-up guidance	Standard	1
D23.	Delivery of full migration	Major	1
D24.	Sign-off on County pre-migration balancing	Exception	0
D25.	Delivery of full migration	Major	1
D26.	Updated Data Migration Plan	Standard	1
D27.	Sign-off on County pre-migration balancing	Exception	0
D28.	Final migration iteration, including new legacy data created up to the date of cutover	Major	1
D29.	Final exception log	Standard	1
D30.	Track Acceptance form	Exception	0
D31.	Completed and delivered code, reports or integrations	Standard	1
D32.	Changed Use Cases as needed, to document changes	Standard	1

<b>ID</b>	<b>Description</b>	<b>Type</b>	<b>Review Iterations</b>
D33.	Deliver the custom programming in a software release	Exception	0
D34.	Deliver Final Test Plan	Standard	2
D35.	Deliver Final Test Cases	Standard	1
D36.	Delivery of resolution plan and associated tasks	Standard	1
D37.	Track Acceptance form	Exception	0
D38.	Training plan	Major	2
D39.	Training syllabus	Standard	2
D40.	All training materials as detailed by the training plan	Standard	2
D41.	Delivery of end user training courses per schedule	Exception	0
D42.	Track Acceptance form	Exception	0
D43.	System Test Plan	Standard	2
D44.	Script training class	Exception	0
D45.	System Test Scripts for performance, batch, security, and System administrative functions	Standard	1
D46.	Defect corrections	Exception	
D47.	Production-ready System	Exception	
D48.	Completed System Test Plan	Standard	1
D49.	Defect tracking system (PTS) updates and maintenance	Exception	0
D50.	Track Acceptance form	Exception	0
D51.	Go-Live Plan	Major	3
D52.	Contractor System is used as the system of record	Exception	
D53.	Track Acceptance form	Exception	0
D54.	Delivery of resolution plan	Standard	2
D55.	Delivery of SEV1 fixes	Exception	
D56.	Remediation of Defects according to transition plans	Exception	
D57.	Final Project Services Audit report	Standard	2
D58.	Track Acceptance form, Payout 1	Standard	0
D59.	Track Acceptance form, Payout 2	Standard	0
D60.	Track Acceptance form, Payout 3	Standard	0
D61.	Track Acceptance form, Payout 4	Standard	0

**TRACK 3. Project Planning**

**TASK 3.1. Project Preparation**

Project Preparation describes the collaboration between the County and Contractor to make preparations to begin the project.

3.1.1. Contractor Activities

Upon execution of the Contract between the County and Contractor, the Contractor team will initiate the project and start preparation and mobilization of its resources in accordance with the requirements defined in this SOW. The County and Contractor will determine a project start date, and activities will include the following:

1. Prepare agenda, presentation, and handouts for Task 3.2 Project Kickoff. Agenda shall include:
  - a. Project timeline and activities overview
  - b. Presentation of the Contractor staff
  - c. Project goals
  - d. Summary presentation of the overall project scope
2. Coordinate with the County PM on logistics.

Activities listed above will be completed as a joint effort between the Contractor’s PM, the County PM, and project team, and will be accomplished at each PM’s facility.

3.1.2. County Activities

The County will support planning and meeting preparation activities.

3.1.3. Acceptance Criteria for Contractor Deliverables

1. Meeting materials conform to reasonable business standards and include the topics agreed upon by the County and Contractor.
2. Schedule for all Tracks accommodates County priorities and needs.

3.1.4. Task Summary

<b>Activity Duration:</b>	Two (2) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 Exec Sponsor
<b>Contractor Artifacts</b>	
A1. Kickoff meeting agenda A2. Kickoff meeting participant handouts	
<b>Contractor Deliverables:</b>	
D1. Kickoff meeting PowerPoint presentation D2. Project timeline	
<b>County Deliverables:</b>	
None	

**TASK 3.2. Project Kickoff**

The project kick-off allows the Contractor and County project teams the opportunity to communicate the project plan to the County staff and to create support for the project.

3.2.1. Contractor Activities

Lead and participate in the kickoff meeting.

3.2.2. County Activities

Provide meeting room facilities to accommodate the kickoff meeting and participate in the kickoff meeting. Provide appropriate resource scheduling to staff the office and ensure kickoff meeting participation.

3.2.3. Acceptance Criteria for Contractor Deliverables

1. Completion of the Kickoff meeting and completion of any related goals.

3.2.4. Task Summary

<b>Activity Duration:</b>	One (1) Business Day
<b>Activity Location:</b>	Onsite
<b>Contractor Staff Count:</b>	1 PM, 1 SMEs, 1 BA and 1 Exec Sponsor
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D3. Kickoff meeting facilitation
<b>County Deliverables:</b>	C1. Participate in kickoff meeting

**TASK 3.3. Review/Revise Project Schedule**

This Task describes the effort needed to conduct the first detailed planning session post Contract signing. All Tasks, resource needs, facilities and logistics, etc., should be addressed.

3.3.1. Contractor Activities

Contractor will prepare a detailed project timeline that will identify each specific Deliverable, as well as supporting Tasks, as necessary for effective project scheduling and control. The timeline will provide the estimated duration of each Task, dependencies, and the type and level of participation of Contractor and County staff necessary to achieve the plan objectives.

Contractor will perform the following:

1. Conduct project planning session(s) with County project management, as needed, to reach agreement.
2. Develop the project timeline, as described above.
3. Compile the Project Charter from the agreed-upon detailed project timeline, governance roles and protocols, and project goals. The Charter is a summary suitable for a lay audience.

3.3.2. County Activities

1. Participate in project planning meetings.
2. Review and approve project timeline. All changes to the approved timeline will be handled through a formal change management process.
3. Inform Contractor of applicable County technical standards and preferred practices.

3.3.3. Acceptance Criteria for Contractor Deliverables

1. Project timeline is complete and schedules provide reasonable time to perform tasks.
2. Schedule of Milestones and Payments (Exhibit B) is consistent with the project timeline.

3.3.4. Task Summary

<b>Activity Duration:</b>	Ten (10) Business Days
<b>Activity Location:</b>	Onsite and/or Remote
<b>Contractor Staff Count:</b>	1 PM, 1 BA
<b>Contractor Artifacts:</b>	
A3. Project Planning Meeting facilitation	
<b>Contractor Deliverables:</b>	
D4. Project charter and detailed timeline	
<b>County Deliverables:</b>	
C2. Attendance at Project Planning Session	
C3. Communication detailing County technical standards	

**TRACK 4. Hardware & Software Installation**

Activities in this Track represent installation tasks that are performed at various times in the project, subject to project planning in Track 3.

**TASK 4.1. Confirm the Recommended Server Hardware**

4.1.1. Contractor Activities

Work with County IT to confirm the final network, server, and desktop hardware requirements needed to support the County’s development, training, projected operational activity and projected growth plans.

4.1.2. County Activities

Collaborate with Contractor and exchange information to assist in arriving at an agreed physical architecture and installation schedule.

4.1.3. Acceptance Criteria for Contractor Deliverables

Network, server, operating system and database management software, field device and desktop recommendations are provided to the County and are in compliance with County standards.

4.1.4. Task Summary

<b>Activity Duration:</b>	One (1) Business Day
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	
	None
<b>Contractor Deliverables:</b>	
	D5. Server, O/S and DBMS recommendations are provided to County.
<b>County Deliverables:</b>	
	C3. County and Assessor technical standards

**TASK 4.2. Order & Receive Hardware OS and Database Software**

4.2.1. Contractor Activities

None

4.2.2. County Activities

1. Order Hardware, Operating Systems, Database Management Software for platform.
2. Receive all ordered items.

4.2.3. Acceptance Criteria for Contractor Deliverables

None

4.2.4. Task Summary

<b>Activity Duration:</b>	N/A
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	N/A
<b>Contractor Artifacts:</b>	

None
<b>Contractor Deliverables:</b>
None
<b>County Deliverables:</b>
C4. Receive all items

**TASK 4.3. Install, Test and Validate Server, OS, Database and Software**

County installs servers, operating system software, database management software, and all related components to prepare for development, training and an eventual production environment.

4.3.1. Contractor Activities

1. Answer questions and assist in solving issues which may arise from County during installation.

4.3.2. County Activities

1. Install hardware, operating systems, and database management software for platform.
2. Install and verify all items.

4.3.3. Acceptance Criteria for Contractor Deliverables

None

4.3.4. Task Summary

<b>Activity Duration:</b>	N/A
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	
None	
<b>Contractor Deliverables:</b>	
None	
<b>County Deliverables:</b>	
C5. Operating physical environment	

**TASK 4.4. Desktop Deployment (Contractor to determine if needed)**

4.4.1. Contractor Activities

1. Assist the Assessor’s PC/LAN Technicians as requested in the configuration of the desktop PC in the following possible activities:
  - a. Installation and configuration of the desktop database component
  - b. Installation and configuration of Contractor’s user client program
  - c. Installation of field-related components for tablet/laptop PCs
  - d. Assist IT, as requested in the installation of System database components, including providing all required scripts for installation and all required schemas.

4.4.2. County Activities

1. ITD will assure proper configuration of all hardware and related equipment and devices, which the County may acquire subsequent to the execution of this SOW, which is not purchased from or through Contractor, or not recommended or specified by Contractor, and assure such hardware is compatible with the licensed software and Contractor’s proposed database environment.

2. ITD, where appropriate, will implement procedures sufficient to satisfy its obligations under the Agreement for security, including appropriate control of its employees to prevent misuse, unauthorized copying, modification, or disclosure of the licensed software.

4.4.3. Acceptance Criteria for Contractor Deliverables

1. The entire platform, including end user PCs/laptops/tablets, is ready for installation of Contractor and third-party software(s) and database(s), as required, to operate the Contractor products.

4.4.4. Task Summary

<b>Activity Duration:</b>	Five (5) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D6. PC/Laptop/Tablet configurations and master configuration dictionary/documentation
<b>County Deliverables:</b>	C6. Installation and configuration of hardware and software

**TASK 4.5. Track Acceptance**

4.5.1. Contractor Activities

Prepare and deliver Track Acceptance form.

4.5.2. County Activities

Complete Track Acceptance form and return to Contractor.

4.5.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

4.5.4. Task Summary

<b>Contractor Deliverables:</b>	D7. Track Acceptance form
<b>County Deliverables:</b>	None

**TRACK 5. Gap Analysis**

The purpose of this Track is to review the County’s business and functional requirements to determine what differences exist between desired functionality and the new system. The Functional Areas listing found in Track 1 shall be used as input to this Track. The Gap Analysis will help parties determine if there will be a change in business process, configuration to the software, or an enhancement to the software to accommodate the gap.

A four-week Gap Analysis workshop was conducted as part of the procurement process leading to this Contract. If both Contractor and the County agree and identify certain business processes as being “resolved”, then those business processes need not be included as part of this Task.

As per Track 8: Development, if custom programming is required to meet a requirement, Appendix 3, Part D shall be prepared to document the need, or if a Contract change order is required, then that process will be followed. The Gap Analysis is vital in further refining project tasking.

**TASK 5.1. Gap Coordination**

5.1.1. Contractor Activities

1. Schedule a series of meetings according to the project timeline and individual schedules.
2. Meetings should generally be held Onsite; however, follow up meetings using web meetings may be used as needed to complete tasking.

5.1.2. County Activities

1. Identification of roles
  - a. Identify and document the team member names with associated areas of discipline, (e.g., residential, personal property, etc.), noting who has authority to make decisions and commitments for the County and Contractor teams.
  - b. Distribute list of roles and responsibilities to all team members.
2. Gather documents to be used for Gap Analysis.
3. Provide a list of the business processes that are performed in the office with a description of the steps used to perform each process. A sample of all relevant forms or reports used in each business process should be included in this documentation.

5.1.3. Acceptance Criteria for Contractor Deliverables

1. Gap Analysis meeting schedule allows for County staff attendance.
2. Shell or template Gap Analysis Document (GAD) is delivered in a form ready for use in Gap Analysis sessions.

5.1.4. Task Summary

<b>Activity Duration:</b>	Three (3) Business Days
<b>Activity Location:</b>	Onsite/Remote
<b>Contractor Staff Count:</b>	1 PM, 1 BA
<b>Contractor Artifacts:</b>	
A4. Gap Analysis meeting schedules, agenda and planning facilitation	
<b>Contractor Deliverables:</b>	
D8. Shell Gap Analysis Document (GAD)	
<b>County Deliverables:</b>	
C7. All existing process flows/maps that may apply to this Task	
C8. All related technical, data, or functional information required by Contractor	

**TASK 5.2. Gap Analysis Workshop**

This Task describes the gap identification process, to be conducted using a workshop format, and how the decisions made in, or subsequent to, the Gap Analysis sessions are documented.

5.2.1. Contractor Activities

Contractor will demonstrate and/or explain how the business need will be met in the System, and compare the System approach with the business need being discussed. Possible outcomes are shown below.

1. The System meets the need using only provided configuration capabilities.
  - a. If yes, then the requirement is marked as met.
  - b. If not, the requirement is marked as a gap and flagged for resolution.
2. The System meets the need using only the provided configuration capabilities, but in a manner that requires an acceptable work around or County business process change.
  - a. If yes, the requirement is marked as met, and the process change/work around is documented for use in future training and testing tasks.
  - b. If not, the requirement is marked as a gap and flagged for resolution.

5.2.2. County Activities

1. Prior to each Gap Analysis session, the County will conduct research and come prepared with current policy, procedures, and expected System outcomes for the given Gap Analysis topic.
2. Review Gap Analysis session output and any other analysis documents for clarity and completeness.
3. Attend Gap Analysis sessions.

5.2.3. Acceptance Criteria for Contractor Deliverables

1. Agreement that all System processes have been analyzed

5.2.4. Task Summary

<b>Activity Duration:</b>	Ninety (90) Business Days
<b>Activity Location:</b>	Onsite or Remote as mutually agreed
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 SME, and 1 Development Lead
<b>Contractor Artifacts:</b>	
A5. Work	
<b>Contractor Deliverables:</b>	
D9. Gap Analysis workshop completion	
D10. Documentation of Gap Analysis issues needing resolution	
<b>County Deliverables:</b>	
None	

**TASK 5.3. Draft Gap Analysis Document (GAD)**

5.3.1. Contractor Activities

1. Prepare the GAD with the following sections as a minimum:
  - a. Business process
  - b. Gap or “met” result
  - c. Options for all gaps
  - d. Recommended resolution for all gaps
  - e. Cost estimate if resolution is considered to require a Contract change order
2. Verify that all functional requirements have documented resolutions.

- 3. Prepare and deliver the draft GAD.
- 4. Facilitate a complete review of the GAD, making notes/changes and documenting final outcome.

5.3.2. County Activities

- 1. Review draft GAD and any related analysis documents for clarity and completeness.
- 2. Participate in the GAD review session.

5.3.3. Acceptance Criteria for Contractor Deliverables

- 1. A draft GAD has been delivered to the County and meets the minimum requirements of this Task.

5.3.4. Task Summary

<b>Activity Duration:</b>	Ten (10) Business Days
<b>Activity Location:</b>	GAD review conducted Onsite. GAD preparation conducted remotely.
<b>Contractor Staff Count:</b>	1 PM, 1 BAs, 1 Development Lead, 1 SME
<b>Contractor Artifacts:</b>	
A6. Facilitated GAD review session	
<b>Contractor Deliverables:</b>	
D11. Draft Gap Analysis Document	
<b>County Deliverables:</b>	
None	

**TASK 5.4. Final Gap Analysis Document (GAD)**

5.4.1. Contractor Activities

- 1. Edit the GAD and make corrections as required in the GAD review session.
- 2. Provide final GAD.

5.4.2. County Activities

- 1. Attend GAD review sessions.
- 2. Provide feedback/comments on GAD.
- 3. Review and approve final GAD.

5.4.3. Acceptance Criteria for Contractor Deliverables

- 1. Final GAD shows all business processes addressed, and accepted resolutions are documented.

5.4.4. Task Summary

<b>Activity Duration:</b>	Five (5) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Development Lead, 1 SME, 1 BA
<b>Contractor Artifacts:</b>	
None	
<b>Contractor Deliverables:</b>	
D12. Final GAD delivered	
<b>County Deliverables:</b>	

None
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**TASK 5.5. Track Acceptance (Decision to move to next phase)**

5.5.1. Contractor Activities

Prepare and deliver Track Acceptance form.

5.5.2. County Activities

Complete Track Acceptance form, and return to Contractor.

5.5.3. Acceptance Criteria for Contractor Deliverables

Track Acceptance form format and use is in accordance with this SOW.

5.5.4. Task Summary

<b>Contractor Deliverables:</b>
D13. Track Acceptance form
<b>County Deliverables:</b>
None

**TRACK 6. Design**

This Track involves the identification and analysis of the specific System setup options and new development necessary to meet the County requirements, as required by the GAD and routine Contractor installation requirements. The design analysis and associated documents will be completed for each of the Functional Areas, including Integration and reporting requirements described within this SOW and as further defined by the GAD.

The process of developing the Use Cases follows an iterative, draft/review cycle with multiple reviews of each document possible by the County.

Use Cases will be developed in series for a given topical area. However, because it is expected that some Use Cases will require more effort than others, several Use Cases may be in development at any given point in time. Therefore, Task 6.1 and Task 6.2 will occur simultaneously.

The approach followed for each module will consist of a set of design and analysis sessions with key County users to determine how the software applications can be developed and configured to meet the unique business requirements of the County.

Contractor is responsible for writing a Use Case for each module. The final set of approved Use Cases will represent the approved requirements and design for all new applications, modifications, and configuration functionality to be developed by Contractor.

All Use Cases for all custom development must be completed prior to the start of Task 6.3.

Unless otherwise indicated, activities described within this Track refer to all new development or System enhancements; all reports; and all integrations required by this SOW.

**TASK 6.1. Create Preliminary Use Cases**

This Task addresses the need to further analyze the gaps and other requirements documented in the GAD, and identify exact requirements for ultimate use in creating a development specification.

**6.1.1. Contractor Activities**

1. Schedule and prepare for a series of workshops to completely analyze all potential development activity, and design specific System requirements.
2. Maintain listing of all Use Cases and their status on PTS.
3. Conduct workshops necessary to analyze and produce Use Cases that address the following:
  - a. Each Gap found listed in the GAD
  - b. Each Integration listed in Appendix 3, Part C
  - c. Each new functionality area listed in Appendix 3, Part D
  - d. Each report listed in Appendix 3, Part B
  - e. Any other issue or Defect that is found to require more than very minor correction
4. Include in each Use Case the topical areas shown below (note that each area below may not be applicable in every Use Case):
  - Cost estimate, or cost confirmation if estimate previously provided
  - Business or task description
  - Scenarios (specific variations of the process or task that the Use Case must consider)
  - User roles involved
  - Preconditions
  - Process statement or process flow
  - Post conditions
  - Data, user-interface, security, and business layer elements needed to include any workflow, validation, audit, and domain values
  - Data or other system integration requirements
  - Data migration impacts, if known
  - For Integrations, include frequency, and the direction of data flow and transformation
  - For reports, include a layout diagram
5. Present draft Use Cases to County for review

6.1.2. County Activities

1. Prepare and provide sample data and documents which will add value to the analysis workshops regarding County requirements.
2. Participate in all workshops sessions as needed.
3. Provide County policy and procedures as requested by Contractor.
4. Conduct reviews and provide feedback on each Use Case.

6.1.3. Acceptance Criteria for Contractor Deliverables

1. Use Cases must make best effort to comply with the requirements of this SOW and ensure that security and financial controls comply with the County policies and procedures.
2. Draft use case review comments have been received by Contractor.

6.1.4. Task Summary

<b>Activity Duration:</b>	Fifty (50) Business Days
<b>Activity Location:</b>	Initial workshops Onsite, with Remote follow-up as needed
<b>Contractor Staff Count:</b>	1 PM, 1 BA
<b>Contractor Artifacts:</b>	
A7. Workshop facilitation and preparation	
<b>Contractor Deliverables:</b>	
D14. Preliminary Use Cases	
<b>County Deliverables:</b>	
C9. Review of comments and interaction with Contractor staff as needed	
C10. Participation in draft Use Case Remote reviews	

**TASK 6.2. Revise Use Cases**

Contractor will, based on the information gathered and documented in Task 6.1, revise and elaborate upon the preliminary Use Cases for review by the project team. This Task is largely performed remotely.

6.2.1. Contractor Activities

1. Revise Use Cases as required during the review process.
2. Create a Development Plan and include a fixed cost bid against the Contract development budget, and a revised project schedule, showing how all development work will be accomplished. Include sequence, dependencies, and approximate durations in the Development Plan.
3. Note that some details in this plan may change as the project progresses, and that additional facts may become evident. If during the course of the Development Track the changes to the Development Plan appear to be too great (as mutually agreed upon by Contractor and the County), then Contractor shall revise the Development Plan and redeliver it for Acceptance by the County.

6.2.2. County Activities

1. Provide additional information and detail as requested and available.
2. Conduct final approval review.

6.2.3. Acceptance Criteria for Contractor Deliverables

1. Use Cases comply with the requirements of this SOW and include all of the requirements of the draft Use Cases.
2. Requirements must accurately and completely reflect the business needs of the County.
3. All gaps, as defined by the accepted GAD, must have been addressed.

6.2.4. Task Summary

<b>Activity Duration:</b>	Twenty (20) Business Days
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 Development Lead, 1 SME
<b>Contractor Artifacts:</b>	
	None
<b>Contractor Deliverables:</b>	
	D15. Revised Use Cases
	D16. Revised Development Plan with bid against Development Pool
<b>County Deliverables:</b>	
	C11. Review of comments and interaction with Contractor staff, as needed

**TASK 6.3. Development Decision**

6.3.1. Contractor Activities

Support questions from the County, as required.

6.3.2. County Activities

1. Review fixed cost for development effort against original pool of budgeted development hours.
2. Conduct necessary due diligence needed to support a decision to move forward with Task 8.1. Once decision to move forward is made, communicate to all stakeholders, as required.

6.3.3. Acceptance Criteria for Contractor Deliverables

N/A

6.3.4. Task Summary

<b>Activity Duration:</b>	Ten (10) Business Days
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	As required to support County questions
<b>Contractor Artifacts:</b>	
	None
<b>Contractor Deliverables:</b>	
	None
<b>County Deliverables:</b>	
	C12. Go/No-Go decision regarding the Development Plan
	C13. Approved Development Plan and Use Cases

**TASK 6.4. Track Acceptance**

6.4.1. Contractor Activities

Prepare and deliver Track Acceptance form.

6.4.2. County Activities

1. Complete Track Acceptance form and return to Contractor.
2. Update Schedule of Milestones and Payments to reflect programs and activities within scope.

6.4.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

6.4.4. Task Summary

<b>Contractor Deliverables:</b>
D17. Track Acceptance form
<b>County Deliverables:</b>
C14. Updated Schedule of Milestones and Payments

**TRACK 7. Data Migration**

This Track describes activities performed to migrate/convert data from the County's legacy applications to the System.

The data migration will be performed in at least four migration iterations, as described below, with signoffs required for each iteration before proceeding. It is expected that Contractor and the County will collaboratively perform visual and programmatic inspection of the data as appropriate for each iteration.

Testing shall be conducted per the Data Migration Plan. Testing concepts will include balance totals, visual sampling, and both manual and programmatic inspection of data.

Acceptance of the final migration iteration will be contingent upon balancing. The County describes its balancing expectations in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria. During Task 7.1, Contractor and the County will collaborate to identify the instruments required to test balances. Roles for the balancing activities will be fully described in the Data Migration Plan; however, it is assumed that the County will perform the data validation, with appropriate support and expertise provided by Contractor.

As with other project deliverables, review and Acceptance are expected to be completed within a timeframe agreed upon by both parties. There will be sufficient time allotted to ensure that the County can perform data validation, and that the results are adequate to proceed.

**TASK 7.1. Data Migration Plan**

Contractor, in a collaborative effort with the County, will facilitate the analysis necessary to develop a Data Migration Plan. The Data Migration Plan will be version controlled and updated whenever significant changes have been made.

**7.1.1. Contractor Activities**

1. Conduct an initial data migration planning Workshop between the Contractor conversion specialists and the County's staff.
2. Create the draft Data Migration Plan; the plan includes the management of the following:
  - a. Request inventory of data sources, including domain tables
  - b. Confirmation and review of historical data scope
  - c. Data mapping from all authoritative sources
  - d. Data conversion coding requirements
  - e. Table loading sequence
  - f. Data migration testing (balancing, sampling, etc.)
  - g. County and Contractor data migration roles and responsibilities
  - h. Iteration process per this SOW
  - i. Sign-offs at pre-defined steps
3. Collaborate with the County to create tests/validations that can be used to manually inspect the data, or can be implemented as code or scripts. Tests/validations should support balancing activities necessary to validate the standards described in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.
4. Deliver a draft Data Migration Plan.
5. Conduct a Data Migration Plan review meeting with the County to receive feedback.
6. Make edits to the Data Migration Plan.
7. Deliver the final Data Migration Plan.

**7.1.2. County Activities**

1. Attend data migration planning sessions.
2. Collaborate with Contractor to create tests/validations that can be used to manually inspect the data, or can be implemented as code or scripts. Tests/validations should support balancing activities necessary to validate the standards described in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.
3. Review and provide feedback on the draft Data Migration Plan.

4. Approve the final Data Migration Plan.

7.1.3. Acceptance Criteria for Contractor Deliverables

1. The draft Data Migration Plan is delivered to the County. The word ‘draft’ is defined as a preliminary outline of the tasks to be performed and how they will be performed.
2. The final Data Migration Plan meets the requirements of the County, supports the accurate migration of all in-scope data, fully documents the data migration process, and is ready for signature by the County.
3. Tests/Validations described in the Data Migration Plan promote balancing to the standards described in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.

7.1.4. Task Summary

<b>Activity Duration:</b>	Fifteen (15) Business Days
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Specialist, 1 SME, 1 BA
<b>Contractor Artifacts:</b>	
A8. Data migration planning meeting agenda	
<b>Contractor Deliverables:</b>	
D18. Data migration start (draft Data Migration Plan)	
D19. Final Data Migration Plan	
<b>County Deliverables:</b>	
C15. Approval of draft Data Migration Plan	
C16. Approval of final Data Migration Plan	

**TASK 7.2. Data Migration Preparation and Data Mapping**

This Task describes the activities necessary to begin executing the Data Migration Plan, including the inventory/acquisition of data, preparation of the test environment, and mapping of source data to appropriate locations in the System.

7.2.1. Contractor Activities

1. Create a data migration meeting schedule that supports the timeline.
2. Assist the County in identification of data sources to include in data migration.
3. Lead data mapping meetings and document mapping decisions.
4. Assist County IT to set up a test environment.
5. Produce data maps for each identified data source.
6. Update the Data Migration Plan per migration and data mapping meetings.

7.2.2. County Activities

1. Attend data migration and data mapping meetings.
2. Procure, receive authority for, and/or obtain data as required to support data migration analysis.
3. Establish a test environment for review and approval of sample and final data migrations.
4. Review and approve the updated Data Migration Plan, including data maps.

7.2.3. Acceptance Criteria for Contractor Deliverables

1. Data maps have been produced for all data sources determined to be in scope.
2. Data maps address migration or creation of all data required for full production functionality required by the County.

7.2.4. Task Summary

<b>Activity Duration:</b>	Fifty-five (55) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 SME, 1 Data Conversion Analyst
<b>Contractor Artifacts</b>	
A9.	Data mapping meeting schedule
A10.	Facilitation of data mapping meetings
<b>Contractor Deliverables:</b>	
D20.	Updated Data Migration Plan including data maps
<b>County Deliverables</b>	
C17.	Participation and expertise of County resources necessary to promote acquisition of all metadata required to conduct data mapping
C18.	Data migration test environment
C19.	Acceptance of the updated Data Migration Plan including all data maps

**TASK 7.3. Iteration 1: Prototyping**

Contractor and the County will focus on the migration of sample data sets representing major account/property ownership and exemption relationships, including, but not limited to, the following:

- Active/Inactive (retired) properties
- Redacted owners
- Partially and totally exempted properties
- Properties with varied ownerships such as Sole Owner, Tenants in Common, Tenants by Entirety, Conto
- Properties owned by entities such as Corporations, Trusts, Individuals, Public Agencies
- Properties from each tax authority
- Properties that have been split/combined/platted
- Business Personal Property Accounts
- Mobile Homes (Unsecured)

In order to ensure that an adequate sample is tested, at least 5% of the total count of a given property type must be included in this iteration.

During this iteration, validation routines will be used to determine the integrity of the data migration. Contractor and the County will collaborate to identify factors to assess the “cleanliness” of the data (e.g., the impact of incorrect data to application functionality, number of accounts affected, etc.). As issues with the migration of the subset are identified, Contractor and the County will determine whether the data should be cleansed by the County, or whether it can be addressed via Contractor’s data migration routines.

There will be multiple cycles of extracts, validations, and conversions into the Contractor data models. Once an acceptable level of cleanliness is attained, the County will sign off to indicate that the account type is eligible for the full migration routine. Once sign-offs are collected for all account types, the County will sign off to indicate that the first full migration iteration (Iteration 2) can commence.

7.3.1. Contractor Activities

1. Assist the County in identifying property types and sample data to be included in prototyping.
2. Receive and inventory the data sent.
3. Populate translation tables.
4. Move data from the load tables to the Contractor application tables.

5. Stage data in the test instance of the System. Produce data validation reports from the test instance correlating with balance reports produced from the legacy system.
6. Submit a detailed request to the County for data clean-up. The request shall include the following, at a minimum:
  7. Description of error
  8. Data source, field/record name
  9. Desired outcome of clean-up
  10. Conduct iterative data validations, as required, to accomplish a reliable, repeatable data migration.
  11. Document tests/validations in the Data Migration Plan.

7.3.2. County Activities

1. Identify property types and select sample data for prototyping.
2. Extract data to the intermediate file format as provided by Contractor (multiple cycles as defined by the Data Migration Plan and project timeline).
3. Correct (if needed) all data clean-up requests submitted by Contractor. This may require manual or programmatic efforts, or may also be collaboratively determined to be more advantageous for Contractor to perform.
4. Conduct iterative data validations, as required, to accomplish a reliable, repeatable data migration.

7.3.3. Acceptance Criteria for Contractor Deliverables

1. At least 5% of records for identified major property types have been processed.
2. The quality of the resulting data is sufficient to proceed with full data migration.

7.3.4. Task Summary

<b>Activity Duration:</b>	Two Hundred (200) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 SME, 1 BA, 1 Conversion Analyst
<b>Contractor Artifacts:</b>	
A11. Data extraction and clean-up requests as required to complete this iteration	
A12. Updates to Data Migration Plan	
<b>Contractor Deliverables:</b>	
D21. Delivery of sample migration	
<b>County Deliverables</b>	
C20. Data extractions and clean-up as requested by Contractor	
C21. Signature on Iteration 1 sign-off documents	

**TASK 7.4. Data Clean-Up**

This Task describes the activities needed to clean source data in preparation for insertion into the System. The County will perform the majority of data clean-up with guidance from Contractor. Contractor and the County may collectively determine that select data cleansing would best be performed by Contractor. *If so, a change request will be required.* Data clean-up will overlap with Task 7.3 and will continue as appropriate until Task 7.7.

7.4.1. Contractor Activities

1. Provide guidance to the County during clean-up activities as required to ensure timely and accurate results.
2. Programmatic data cleansing (if indicated as being appropriate)

7.4.2. County Activities

1. Scrub the legacy data set subject to migration.
2. Inspect scrubbed data to ensure that cleanliness meets standards defined in the data migration plan.

7.4.3. Acceptance Criteria for Contractor Deliverables

1. Participation promotes efficient and accurate County data clean-up.
2. (If needed) scrubbed data meets established standards.

7.4.4. Task Summary

<b>Activity Duration:</b>	Fifteen (15) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 SME, 1 Data Conversion Analyst
<b>Contractor Artifacts:</b>	
None	
<b>Contractor Deliverables:</b>	
D22. Data clean-up guidance	

<b>County Deliverables:</b>
C22. Scrubbed data set
C23. Analysis and confirmation that data has reached an acceptable state of cleanliness.

**TASK 7.5. Iteration 2: Full Data Set**

Contractor will deliver a full system-wide database migration, containing all data taken from the end of the tax year. Contractor and the County will perform visual and programmatic inspection of the data.

Issues will be identified, documented, and resolved. For each issue, Contractor and the County will collaboratively determine the source, and address the problem in a timely manner. The full migration of all accounts should demonstrate that the migration process is adequate for all data subject areas well in advance of the date it is required.

7.5.1. Contractor Activities

1. Receive and inventory data sent by the County.
2. Populate translation tables.
3. Move data from the load tables to the Contractor application tables.
4. Stage data in the test instance of the System.
5. Collaborate with the County to document and resolve programmatic and data cleanliness issues.
6. Conduct iterative data validations, as required, to accomplish a reliable, repeatable data migration.
7. Document tests/validations in the Data Migration Plan

7.5.2. County Activities

1. Extract data to the intermediate file format as provided by Contractor (multiple cycles as defined by the Data Migration Plan and project timeline).
2. Collaborate with Contractor to document and resolve programmatic and data cleanliness issues.
3. Conduct iterative data validations, as required, to accomplish a reliable, repeatable data migration.

7.5.3. Acceptance Criteria for Contractor Deliverables

1. Successful migration of full County data set.
2. All identified migration issues have been resolved.

6.5 Task Summary

<b>Activity Duration:</b>	Twenty-six (26) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	
A13.	Resolution of Contractor-owned data issues identified in this iteration
A14.	Updates to Data Migration Plan
<b>Contractor Deliverables:</b>	
D23.	Delivery of full migration
<b>County Deliverables:</b>	
C24.	Data extractions as required to support this Task
C25.	Resolution of all County-owned data issues identified in this iteration
C26.	Iteration 2 acceptance

**TASK 7.6. Iteration 3: User Acceptance Delivery**

Contractor will deliver a full migration of data to be used in System Testing and for end-user training. This iteration must completely represent the anticipated production migration and result in data suitable for production as defined in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.

In the event that it is determined that the data is not adequate for System Testing (as determined by the County), additional cycles may be required. Note that if the issues are determined to be with the data delivered by the County, the County may be responsible for compensating Contractor for additional cycles.

7.6.1. Contractor Activities

1. Receive and inventory data received from the County. Sign off to indicate acceptance of pre-migration balances.
2. Migrate data from the load tables to the Contractor application tables.
3. Conduct data tests/validations to support Iteration 3 acceptance.
4. Collaborate with the County to document and resolve programmatic and data cleanliness issues.
5. Document tests/validations in the Data Migration Plan

7.6.2. County Activities

1. Perform pre-migration balancing.
2. Extract data to the intermediate file format as provided by Contractor (multiple cycles as defined by the Data Migration Plan and project timeline).
3. Conduct data tests/validations to support Iteration 3 acceptance.
4. Collaborate with Contractor to document and resolve programmatic and data cleanliness issues.

7.6.3. Acceptance Criteria for Contractor Deliverables

1. Successful migration of full County data set.
2. All identified migration issues have been resolved.
3. Data is suitable for production as defined in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.

7.6.4. Task Summary

<b>Activity Duration:</b>	Forty-three (43) Business Days
<b>Activity Location:</b>	N/A

<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 SME, 1 Conversion Analyst, 1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	
A15.	Resolution of Contractor-owned data issues identified in this iteration
A16.	Updates to Data Migration Plan
<b>Contractor Deliverables:</b>	
D24.	Sign-off on County pre-migration balancing
D25.	Delivery of full migration
<b>County Deliverables:</b>	
C27.	Data extractions as required to support this Task
C28.	Resolution of all County-owned data issues identified in this iteration
C29.	Iteration 3 acceptance

**TASK 7.7. Go-Live Data Migration Planning**

This Task describes the data migration planning required for Task 7.8. This Task may be performed in conjunction with or as part of Task 11.1. Develop Go-Live Plan.

**7.7.1. Contractor Activities**

1. Update the Data Migration Plan with Go-Live elements to include failover and recovery testing elements at least one (1) month in advance of Task 7.8. The plan should include all required duties by both Contractor and County resources and include step-by-step procedures with estimated durations where appropriate.

**7.7.2. County Activities**

1. Collaborate with Contractor in Go-Live migration planning.
2. Review and acceptance of updated Data Migration Plan.

**7.7.3. Acceptance Criteria for Contractor Deliverables**

1. Updated Data Migration Plan is delivered at least one (1) month prior to Iteration 4.
2. Data Migration Plan is updated such that Go-Live plans are achievable, reasonable, and complete.

**7.7.4. Task Summary**

<b>Activity Duration:</b>	Two (2) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Conversion Lead, 1 Conversion Analyst
<b>Contractor Artifacts:</b>	
None	
<b>Contractor Deliverables:</b>	
D26.	Updated Data Migration Plan
<b>County Deliverables:</b>	
C30.	Sign-off on updated Data Migration Plan

**TASK 7.8. Iteration 4: Final Migration**

This Task describes the final steps and preparations needed for Go-Live, including any final data clean-up activities and incorporation of changes in legacy data, up until the production cutover.

7.8.1. Contractor Activities

1. Download final data extraction.
2. Inventory final data extraction against agreed-to structure and sign off to indicate acceptance of pre-migration balances.
3. Run data through data migration program.
4. Conduct data tests/validations to support Final Acceptance.
5. Transfer final migration database.
6. Provide an exceptions log.

7.8.2. County Activities

1. Perform pre-migration balancing.
2. Provide final data migration extraction.
3. Set legacy system in view-only mode for data verification purposes.
4. Conduct data tests/validations to support Final Acceptance including balancing activities to demonstrate that the data meets the standards established in Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.
5. Review the exceptions log.

7.8.3. Acceptance Criteria for Contractor Deliverables

1. Contractor has completed the migration of the data provided in the final data extract according to the Data Migration Plan (including the designated sign-off documents), and Appendix 3, Part A: Data Migration Assumption and Acceptance Criteria.

7.8.4. Task Summary

<b>Activity Duration:</b>	Thirty-four (34) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 Conversion Lead, 1 Conversion Analyst, 1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D27. Sign-off on County pre-migration balancing D28. Final migration iteration, including new legacy data created up to the date of cutover D29. Final exception log
<b>County Deliverables:</b>	C31. Pre-migration balances C32. Final data for migration, as requested C33. Complete validation of data upon receipt of final migration C34. Sign-off on final value balancing

**TASK 7.9. Track Acceptance**

7.9.1. Contractor Activities

Prepare and deliver Track Acceptance form.

7.9.2. County Activities

Sign Track Acceptance form.

7.9.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

7.9.4. Task Summary

<b>Contractor Deliverables:</b>
D30. Track Acceptance form
<b>County Deliverables:</b>
None

**TRACK 8. Development**

Unless otherwise indicated, tasking described within this Track is applicable to new System code, reports, and Integrations created as part of this SOW.

**TASK 8.1. Create New Applications & Software Configuration**

This Task addresses the work that Contractor must perform to create the application enhancements and additions as defined by the Use Cases. As an integral part of software development, Contractor will provide interim functionality demonstrations of work in progress to the County Activities

1. Use Case is assigned to Contractor developer(s).
2. Design meeting between Contractor developer and Contractor SME.
3. Program new code to provide required functionality or outcome.
4. Developer demonstrates functionality to Contractor SME to check that functionality is as expected.
5. Re-work and re-test.
6. Provide interim functionality demonstrations to review work in progress and solicit interim feedback.
7. Re-work and re-test.

8.1.2. County Activities

1. Attend interim demonstrations per Use Case and provide feedback to ensure an accurate understanding of the functionality.
2. Provide additional information as requested.

8.1.3. Acceptance Criteria for Contractor Deliverables

1. New code, report, or integration completely complies with the latest, related Use Case.

7.1 Task Summary

<b>Activity Duration:</b>	Two Hundred Sixty-four (264) Business Days
<b>Activity Location:</b>	Remote
<b>Contractor Staff Count:</b>	1 PM, 1 Development Lead, 1 Infrastructure Analyst
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D31. Completed and delivered code, reports or integrations
<b>County Deliverables</b>	C35. Additional information as requested to support programming effort

**TASK 8.2. In-Process Review Sessions**

In-process review sessions (IPR) are held to review larger groups of new functionality, reports, or Integrations. These reviews shall be led by Contractor for the purpose of reviewing all major groups of functionality as documented by the Development Plan. The primary purpose is to provide a more comprehensive view of logical groups of functionality—to review new code, reports or Integration in the context of the larger System--and offer an early opportunity to direct development efforts and assess progress. IPRs differ from “interim functionality demonstrations” outlined in the Task above, in that they will include demonstration of upstream and downstream processes as required to completely review the new code, report, or Integration. IPRs should be scheduled periodically prior to final delivery of new development.

8.2.1. Contractor Activities

1. Schedule and conduct IPRs.
2. Ensure that all relevant functionality is presented in at least one IRP.

8.2.2. County Activities

Participate in IPRs.

8.2.3. Acceptance Criteria for Contractor Deliverables

1. Facilitation is conducted to meet remote review goals.

8.2.4. Task Summary

<b>Activity Duration:</b>	Included in Task 8.1 duration
<b>Activity Location:</b>	Onsite
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 SME
<b>Contractor Artifacts:</b>	
A17. Workshop agenda	
<b>Contractor Deliverables:</b>	
D32. Changed Use Cases, as needed, to document changes	
<b>County Deliverables:</b>	
None	

**TASK 8.3. Deliver/Install New Software Versions, Enhancements and Patches**

This Task describes the effort needed to prepare and use the modified System, or System part, for testing at County-designated facilities, on new/enhanced/patched software, reports, database portions, etc. The testing shall be conducted using County data unless otherwise agreed upon in advance by the County.

8.3.1. Contractor Activities

1. Deliver custom programming in the pre-defined release, based on the agreed upon package format and deployment process.
2. Support the installation of the new software release.

8.3.2. County Activities

1. Install software release.

8.3.3. Acceptance Criteria for Contractor Deliverables

1. The new software release is installed and functional (not tested for Use Case compliance) in the test environment.
2. Release documentation and process is understandable and usable by County technical staff.

8.3.4. Task Summary

<b>Activity Duration:</b>	Included in Task 8.1 duration
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 SME, 1 Development Lead
<b>Contractor Artifacts:</b>	
None	
<b>Contractor Deliverables:</b>	

D33. Deliver the custom programming in a software release.
<b>County Deliverables:</b>
C36. Install the software release.

**TASK 8.4. Conduct New Software, Enhancements and Patch Testing**

This Task describes the steps needed to support the County during testing on new software as defined by the Use Cases. This testing occurs after Contractor has completed standard QA testing before delivery of the release to the County.

The general goal of the testing is to ensure that the new software performs in accordance with its Use Case, and to provide formal feedback to Contractor regarding compliance. Limited configuration and use of System security, workflow, and other System administrative functions may be required to perform the testing, but should not be the focus. In addition, this testing is not intended to test the configuration of the entire system, prove data migration, or conduct other tests that are part of System Testing.

Testing shall be conducted onsite at County-designated facilities. The majority of the testing is to be conducted by County personnel. Contractor shall be responsible for the development of the test approach and the County is responsible for participating in this effort.

Use of PTS shall be used to document the test/fix cycle as indicated in Section 2.3.6.

8.4.1. Contractor Activities

1. Collaborate to create test cases with the County, or confirm that Use Case tests are adequate. Test cases should be based on the relevant Use Cases.
2. Provide support services to County testers during the execution of test cases.

8.4.2. County Activities

1. Participate with Contractor to confirm/create test cases.
2. Execute the Test Plan.
3. Record software Issues in PTS.
4. Revise test case, if necessary.

8.4.3. Acceptance Criteria for Contractor Deliverables

1. Modules reflect functionality specified in the Use Cases.
2. Exceptions are all noted as Issues.

8.4.4. Task Summary

<b>Activity Duration:</b>	Twenty-eight (28) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 SME
<b>Contractor Artifacts:</b>	
A18.	County access to PTS
A19.	Training delivery and testing support
<b>Contractor Deliverables:</b>	
D34.	Deliver Final Test Plan
D35.	Deliver Final Test Cases
<b>County Deliverables:</b>	
C37.	Participation in drafting Test Plan
C38.	Participation in drafting Test Cases
C39.	Enter testing failures or defects in PTS

**TASK 8.5. Revise Software/Correct Software Defects**

This Task addresses the activities needed for Contractor to address all software Defects discovered during new software, enhancements, or patch testing and discovered up to this point in time through any process (e.g., internal Contractor personnel, other Defects found by the County). User concurrence and acceptance on fixes may occur using remote desktop or web meetings to demonstrate the functionality to the user who logged the original Defect (or their designated alternate). Any Defect that is introduced as a result of a fix shall be recorded and handled in the same manner as Defects found during testing. All Defects shall be recorded in PTS.

**8.5.1. Contractor Activities**

1. Conduct one or more Defect triage meetings to prioritize and agree upon the fix for all Defects logged to date. Log results in PTS. Defect severity will be assigned according to definitions described in Section 2.3.6:
2. Update user and technical documentation to reflect changes, including release notes and configuration documentation.
3. Re-deliver software per agreed resolution.

**8.5.2. County Activities**

1. Conduct all County activities identified with the System Test Plan.
2. Log all Defects and comments in PTS.

**8.5.3. Acceptance Criteria for Contractor Deliverables**

1. Contractor provides fix plan for Defects found in testing.

**8.5.4. Task Summary**

<b>Activity Duration:</b>	Thirty-eight (38) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 SME, 1 Development Lead
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D36. Delivery of fix plan and associated tasks
<b>County Deliverables:</b>	C40. Test/ validate features and functionality of applications and report Defects to Contractor

**TASK 8.6. Track Acceptance**

**8.6.1. Contractor Activities**

Prepare and deliver Track Acceptance form.

**8.6.2. County Activities**

Complete Track Acceptance form and return to Contractor.

**8.6.3. Acceptance Criteria for Contractor Deliverables**

1. Track Acceptance form format and use is in accordance with this SOW.

8.6.4. Task Summary

<b>Activity Duration:</b>	Thirty (30) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Deliverables:</b>	
D37. Track Acceptance form	
<b>County Deliverables:</b>	
None	

**TRACK 9. Training**

This Track addresses the analysis, development and delivery of training to end-users. These requirements are supplemental to Exhibit A, Part 2, Section 2.2.8.

**TASK 9.1. Training Analysis & Planning**

This Task addresses whom to train, how training will be conducted, logistics, and training topics. Training shall be jointly instructed by County and Contractor staff. Contractor’s instructor is needed to supply the detailed knowledge of the applications being taught, and a County SME may be needed to bring the detailed knowledge of the County’s processes and policy to the classroom. Contractor’s instructor will lead the instruction and the County’s SME, when applicable, will assist.

If, while creating the training plan, the County determines additional sessions would be in the best interest of the County, the Contract change order process shall be followed.

9.1.1. Contractor Activities

1. Determine topics for training by group, and determine the number and types of courses needed.
2. Create training syllabus (course outline, instructor guide, student materials as needed for each proposed course). The syllabus will list the course objectives, describe each functionality point that will be covered with the students, and outline the examples to be used as instructional aides.
3. Determine instructor resource needs to include classroom materials, System data for student exercises, learning aids (e.g., charts), tests or exercises to demonstrate mastery, etc.
4. Determine number of training classrooms and course schedules.
5. Collaborate with the County to produce a separate system training database, and strategy for the County to refresh the data, as needed, to support training.

9.1.2. County Activities

1. Collaborate with Contractor to analyze training needs for County personnel.
2. Prepare training classrooms, provide training equipment.
3. Schedule County staff as needed.
4. Review and edit preliminary training plan.

9.1.3. Acceptance Criteria for Contractor Deliverables

1. Training plan covers all County staff, is comprehensive, and is achievable in the time allotted. It should include:
  - a. Course syllabus/outlines
  - b. Student materials
  - c. Instructor manuals
  - d. Course schedules
  - e. Rosters – by name, or by position, as applicable to each training class
  - f. Separate training database with data, where the source of the data will be agreed upon by the County and Contractor
2. Training syllabus is detailed enough to be usable by either County or Contractor, and has sufficient materials and support data to be effective.

9.1.4. Task Summary

<b>Activity Duration:</b>	Twelve (12) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 Trainer, 1 BA
<b>Contractor Artifacts:</b>	
	None

<b>Contractor Deliverables:</b>
D38. Training plan D39. Training syllabus
<b>County Deliverables:</b>
C41. Confirm training requirements C42. Course co-instructors C43. Classrooms, computers and other logistics support

**TASK 9.2. Training Material Development**

This Task describes the activities that will be performed to develop materials needed for various training classes once the training needs have been determined.

9.2.1. Contractor Activities

Develop all materials needed to support the training plan.

9.2.2. County Activities

Support Contractor training development activities as needed, particularly in the area of County policy and procedure changes.

9.2.3. Acceptance Criteria for Contractor Deliverables

1. Training materials support the training plan and are of sufficient detail to allow use by County staff.

9.2.4. Task Summary

<b>Activity Duration:</b>	Seventy-five (75) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 Trainer, 1 Training Coordinator, 1 PM, 1 BA, 1 SME
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D40. All training materials as detailed by the training plan
<b>County Deliverables:</b>	None

**TASK 9.3. Conduct Training**

9.3.1. Contractor Activities

1. Conduct training sessions per training plan.
2. Monitor student progress on subject matter.
3. Report any training deficiencies to County.

9.3.2. County Activities

1. Provide students and facility resources, as agreed upon, to include adequate training facilities to accommodate attendees, and a lab environment to allow for computer accessibility.
2. Provide management of the training plan, schedule, etc.

9.3.3. Acceptance Criteria for Contractor Deliverables

1. Training is conducted in accordance with the training plan; training objectives are acceptably met.

9.3.4. Task Summary

<b>Activity Duration:</b>	Sixty (60) Business Days
<b>Activity Location:</b>	Onsite/remote
<b>Contractor Staff Count:</b>	1 Trainer, 1 Training Coordinator, 1 PM, 1 BA, 1 SME
<b>Contractor Artifacts:</b>	
	None
<b>Contractor Deliverables:</b>	
	D41. Delivery of end user training courses per schedule
<b>County Deliverables:</b>	
	C44. Staff roster for classroom training sessions, SMEs as agreed upon

TASK 9.4. Track Acceptance

9.4.1. Contractor Activities

Prepare and deliver Track Acceptance form.

9.4.2. County Activities

Complete Track Acceptance form, and return to Contractor.

9.4.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

9.4.4. Task Summary

<b>Contractor Deliverables:</b>	
	D42. Track Acceptance form
<b>County Deliverables:</b>	
	None

**TRACK 10. System Testing**

The System Testing phase verifies that all components of the System are functioning properly and ready for use in the production environment, and for the conduct of normal business as the System of record. The following pre-requisites shall be completed prior to the start of System Test:

- Migrated data will be provided for use in System Test per Track 7.
- All development work (Integrations, reports, new functionality) shall be completed, operational, and included with the System installation to be used for testing.
- All configurations, domain values, security, workflows, and other System administration requirements should be completed prior to testing.
- The network environment used for System Test should be established so as to be as close to the production environment as possible. Any variations in network environment should be taken into consideration when evaluating System performance.
- Data shall be staged as needed to support scripted testing. Certain record conditions may not exist in System containing only newly converted data. Record or other data creation, or other manipulations, may be needed to establish the proper condition for testing. Consideration should be given, to the extent practical, to the System condition expected at various times of the tax year.

For County's initial acceptance of each software version, Contractor shall provide an acceptance test period (the "Test Period") that is defined in the the applicable System Test Plan and Use Cases and commences upon installation. Installation shall be defined as: a) the software is installed on the server(s) and/or personal computer(s); b) software configuration; and c) implementation team training, if any, is complete. During the Test Period, County shall determine whether the software meets the Contractor provided functionality as described in Appendix 1 – Functional and Technical Requirements Matrix.

**TASK 10.1. Create Test Plan**

Contractor and the County shall collaborate to produce a comprehensive System Test Plan (STP). The STP shall address the following topics:

- A listing of all scripts to be created along with permutations for each script.
- Data preparation or staging approach, including any need to configure or "spoo" the System so that test conditions representing those found throughout the tax calendar year can be produced. Include the process for refreshing data between testing cycles.
- General method of script execution, to include any sequence dependencies.
- Network and System configuration requirements.
- Numbers of end-users required to complete the testing.
- A general timeline to guide script execution.
- Any instructions, logistics, or other guidance needed beyond that provided in this SOW for the logging, triage, and resolution of Defects.
- Identification of any automated testing to occur—as might be needed to prove System performance standards.

The plan shall encompass the following testing approaches:

1. Functionality user acceptance testing—tests to ensure the System supports all business process areas. These test shall encompass "negative testing" where appropriate (e.g., the System stops improper performance, or properly presents error messages, etc.).
2. Reports/outputs user acceptance testing—tests to ensure that all reports, queries, letters, receipts, etc., perform as needed in all business process areas.
3. Data migration testing—testing beyond that performed in the Data Migration Track, and conducted to ensure that migrated data appears in the correct fields, and is usable to conduct normal business operations.

4. Integration testing—testing to ensure that each integration point performs in accordance with its respective Use Case.
5. Performance testing—testing to ensure that the system responds reasonably well when a normal and expected number of users are simultaneously logged on and conducting normal operations; and when batch routines are being performed against a database containing a simulated record set to be expected after five (5) years of operation. The performance criteria listed in the “Acceptance Criteria for Contractor Deliverables” section of Task 10.3 shall apply.

10.1.2. Contractor Activities

1. Conduct planning workshop and lead development of the STP.
2. Provide System technical architecture and behavior knowledge, as required, to ensure that the STP is as comprehensive and exhaustive as is reasonable, and mutually agreed to by Contractor and the County.
3. Author/revise the STP in preparation for testing.

10.1.3. County Activities

1. Collaborate with Contractor to produce the STP.
2. Provide business domain and technical performance knowledge, as required, to ensure that the STP is as comprehensive and exhaustive as is reasonable, and mutually agreed to by Contractor and the County.

10.1.4. Acceptance Criteria for Contractor Deliverables

1. STP is comprehensive and complete in accordance with this Task.

10.1.5. Task Summary

<b>Activity Duration:</b>	Six (6) Business Days
<b>Activity Location:</b>	Onsite for planning workshop, remote for remainder
<b>Contractor Staff Count:</b>	1 PM, 1 BA, 1 Testing Lead
<b>Contractor Artifacts:</b>	
A20.	Workshop facilitation
<b>Contractor Deliverables:</b>	
D43.	System Test Plan
<b>County Deliverables:</b>	
C45.	None

**TASK 10.2. Create Test Scripts**

Test Scripts shall be created for every test identified in the STP, and shall accommodate all data/condition permutations. Each Test Script shall address the following areas:

- Test description/process statement
- Permutations in terms of data, domain values, record types, etc.
- Test steps, system instructions, or process steps
- Pre-conditions, including data, security, workflow, or other System operations that must be completed prior to execution
- Expected results

10.2.1. Contractor Activities

1. Conduct Test Script authoring training for County testers.
2. Support Test Script creation by County personnel, and ensure that Scripts are created in accordance with the STP.

3. Write all performance, batch, security, and administrative related Test Scripts

10.2.2. County Activities

1. Participate in Test Script training class instructed by Contractor.
2. Write all System Test Scripts, other than those identified above to be written by Contractor.

10.2.3. Acceptance Criteria for Contractor Deliverables

1. Training is conducted by knowledgeable Contractor employees and accomplishes the learning-objectives as evidenced by student testing or student performance observation.
2. All scripts to be written by Contractor are in full compliance with the STP and this Task.

10.2.4. Task Summary

<b>Activity Duration:</b>	Twenty-one (21) Business Days
<b>Activity Location:</b>	Onsite for the script training class, and remote for other activities
<b>Contractor Staff Count:</b>	1 Testing Lead, 1 Development Lead
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D44. Script training class D45. System Test Scripts for performance, batch, security, and System administrative functions
<b>County Deliverables:</b>	C46. none

**TASK 10.3. Conduct Testing**

System Test shall be conducted in accordance with the STP. For most of the common functional test scripts, they should be executed with testers co-located in a classroom setting with Contractor proctors and the County project manager in assistance.

System Test shall be repeated (cycles) until the acceptance criteria in this Task are met. The first System Test cycle shall be comprehensive and 100% of the STP (all scripts and permutations) shall be executed. Subsequent System Test cycles may be conducted after an agreed upon number of Defects have been corrected and System updated with the corrections.

If Contractor wishes to perform any initial off-site testing prior to software delivery, County will not consider any of the off-site testing results as being in any way a substitute for testing the software on-site using County’s development/test, training and production environments and test plans. If Contractor pre-delivery testing is performed, County may ask to see the results, but only for comparison to the on-site results. County reserves the right to revise the test plans provided that reasonable notice is given to the Contractor. County maintains sole authority to certify the successful completion of any and all tests performed by the Contractor on the System.

10.3.1. Contractor Activities

1. Ensure all System Test environment conditions are met prior to execution of any test cycle.
2. Proctor test execution for the first week of the first and second test cycles.
3. Support the execution of all Test Scripts for performance, batch, security, and System administrative functions.

10.3.2. County Activities

1. Execute all Test Scripts.
2. Record all Defects, and participate in Defect triage in accordance with the Project Management Track of this SOW.

3. Schedule resources to complete base product testing within the timeframe dictated by the project timeline.

10.3.3. Acceptance Criteria for Contractor Software Deliverables

1. Total Software Score (TSS) is 50 or less, and zero SEV1 issues remain unresolved for Releases 3 (UAT) and 4 (Go-Live). Release 1 will have TSS 100 or less, and Release 2 will have TSS 75 or less. Acceptance criteria for SEV1 issues in Releases 1 & 2 shall be agreed among the project team.

2. System performance, measured at the System’s physical host site, shall be in accordance with the following, or as otherwise established in STP or applicable Test Script:

- The System shall not “crash, stall, or freeze-up” at any time.
- A simple query, such as searching for a single owner or parcel, shall take no longer than three seconds to return the result, including parcel sketch and photo, with at least 150 users logged on and using the System.
- A moderately complex query, such as searching for all appeals associated with a given property, shall take no longer than eight seconds to produce all results, with at least 150 users logged on and using the System.
- No operational report (an output with relatively small amounts of data needed to support a routine daily process) shall take longer than 5 seconds to be sent to the printer dialog.
- No comparable query for a single property shall take longer than 20 seconds to return five comparable properties.
- Very complex or inclusive queries shall be tested and are able to complete in a mutually agreeable time frame.

10.3.4. Task Summary

<b>Activity Duration:</b>	Twenty-two (22) Business Days
<b>Activity Location:</b>	Onsite proctoring of Test Script execution
<b>Contractor Staff Count:</b>	1 Testing Lead, 1 Development Lead, 1 PM
<b>Contractor Artifacts:</b>	
A21. Test proctoring	
<b>Contractor Deliverables:</b>	
D46. Defect corrections	
D47. Production-ready System	
D48. Completed System Test Plan	
<b>County Deliverables:</b>	
C47. Personnel sufficient to complete all test scripts in the agreed-upon time frame	

**TASK 10.4. Revise/Correct Defects**

This Task will be performed concurrently with Task 10.3.

10.4.1. Contractor Activities

1. Facilitate Defect triage meetings at least once per week, or as needed to address all Defects logged as part of System Test. This shall include the prioritization and classification of each Defect, and documentation of the fix for each Defect.
2. Log results in PTS. Defects are tracked using the process provided in the Project Management Track of this SOW.
3. Correct System Defects and provide software updates or other solutions using Contractor’s release management approach.

10.4.2. County Activities

1. Participate in the Defect triage meetings.

2. Support the installation or other correction of Defects.

10.4.3. Acceptance Criteria for Contractor Deliverables

1. Delivery of agreed-upon fix plan.
2. Delivery of tasks associated with approved fix plan that support Go-Live.

10.4.4. Task Summary

<b>Activity Duration:</b>	Fifteen (15) Business Days or beyond as needed until System Readiness occurs
<b>Activity Location:</b>	Remotely
<b>Contractor Staff Count:</b>	1 PM, 1 Testing Lead
<b>Contractor Artifacts:</b>	
A22. Meeting facilitation	
<b>Contractor Deliverables:</b>	
D49. Defect tracking system (PTS) updates and maintenance	
<b>County Deliverables:</b>	
None	

**TASK 10.5. Track Acceptance**

10.5.1. Contractor Activities

Prepare and deliver Track Acceptance form.

10.5.2. County Activities

Complete Track Acceptance form, and return to Contractor.

10.5.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

10.5.4. Task Summary

<b>Contractor Deliverables:</b>	
D50. Track Acceptance form	
<b>County Deliverables:</b>	
C48. Final Go decision for Go-Live	

**TRACK 11. Go-Live**

**TASK 11.1. Develop Go-Live Plan**

11.1.1. Contractor Activities

Schedule and facilitate a meeting with the County to create and deliver the Go-Live Plan. The following topics or sections shall be addressed:

1. Real time Defect and Issue triage and correction approach, including an Onsite help center and mobile SMEs to support personnel as they first encounter the System for their routine tasking.
  - a. Work and support schedules shall be created and maintained for the duration of the Go-Live support period.
  - b. Contractor technical staff will be available for 3 extended hours for 10 days after Go-Live.
2. Support roles for County and Contractor personnel involved in the plan.
3. Support assignments and schedule for County and Contractor personnel for the first 30 Business Days after Go-Live.
4. Go-live specific communication plan.
5. Other plan needs, as identified.

11.1.2. County Activities

1. Collaborate with Contractor to produce the Go-Live Plan.

11.1.3. Acceptance Criteria for Contractor Deliverables

1. Plan appears to meet the support needs of the County for the first 30 Business Days after Go-Live.

11.1.4. Task Summary

<b>Activity Duration:</b>	Five (5) Business Days
<b>Activity Location:</b>	Onsite for the planning meeting
<b>Contractor Staff Count:</b>	1 PM, 1 BA
<b>Contractor Artifacts:</b>	
	A23. Planning facilitation
<b>Contractor Deliverables:</b>	
	D51. Go-Live Plan
<b>County Deliverables:</b>	
	None

**TASK 11.2. Go-Live Event**

11.2.1. Contractor Activities

Provide the following level of support.

1. The Contractor PM and SMEs, per the Go-Live Plan and supporting schedules, will be Onsite during the Go-Live week for the first 10 Business Days after Go-live

11.2.2. County Activities

1. Perform Go-Live: activate the System and perform user activity such that the System is in daily regular production use and reliance section-wide by County employees.
2. Assist Contractor in performing Go-Live support.

11.2.3. Acceptance Criteria for Contractor Deliverables

1. Contractor System is used as the system of record.

11.2.4. Task Summary

<b>Activity Duration:</b>	One (1) Business Day
<b>Activity Location:</b>	Onsite
<b>Contractor Staff Count:</b>	Sufficient resources and skills to provide support as needed
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D52. Contractor System is used as the system of record
<b>County Deliverables:</b>	C49. Perform the Go-Live action and institute the System as the system of record within the Office of the Assessor

TASK 11.3. Track Acceptance

11.3.1. Contractor Activities

- Prepare and deliver Track Acceptance form.

11.3.2. County Activities

- Complete Track Acceptance form.

11.3.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use is in accordance with this SOW.

11.3.4. Task Summary

<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D53. Track Acceptance form
<b>County Deliverables:</b>	None

**TRACK 12. Transition**

This Track represents post-Go-Live activities intended to facilitate the transition of the System to sustainment, to recognize Final Acceptance, and to deliver retained funds to Contractor.

**TASK 12.1. Remedy Defects**

12.1.1. Contractor Activities

1. Conduct regular Defect triage meetings to prioritize and agree upon the resolution for all Defects logged to date until System Acceptance criteria have been met.
2. Document resolution plan for each Defect in PTS.

12.1.2. County Activities

1. Attend Defect triage meetings and collaborate on resolution plan for all Defects.
2. Support Contractor in the remediation of Defects until System Acceptance criteria have been met.

12.1.3. Acceptance Criteria for Contractor Deliverables

1. For SEV1 Defects - Contractor will create fix plans that will allow the County to complete all legislatively required processes within legally required dates. Partial payment of retained funds may be withheld in the event that the County is unable to successfully perform a legislatively required process within legally mandated dates.
2. For SEV2 Defects – Contractor will create fix plans that will remedy the Defect within 20 Business Days of identification.

12.1.4. Task Summary

<b>Activity Duration:</b>	Fifteen (15) Business Days
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	1 PM, 1 QA Lead, 1 Customer Support
<b>Contractor Artifacts:</b>	None
<b>Contractor Deliverables:</b>	D54. Delivery of resolution plan D55. Delivery of SEV1 fixes
<b>County Deliverables:</b>	C50. Support activities related to resolution plan and associated tasks

**TASK 12.2. System Acceptance / Transition to Support**

This Task describes activities associated with formal System Acceptance and the transition of the County to the Contractor Customer Support team.

12.2.1. Contractor Activities

1. Remedy Defects according to transition plans identified in Task 12.1.
2. Prepare a Project Services Audit report to outline outstanding Issues, Defects, operational Risks, and relevant action items. Revise according to County feedback.
3. Schedule and conduct structured meeting to transfer County to Contractor Customer Support for post-Go-Live support.

12.2.2. County Activities

1. Review draft Project Services Audit report and provide feedback to Contractor.
2. Attend transfer-to-support meeting.
3. Provide signed Acceptance of final Project Services Audit report representing System Acceptance.

12.2.3. Acceptance Criteria for Contractor Deliverables

1. Defects have been remedied according to transition plans.
2. Project Services Audit report describes all outstanding Issues, Defects, operational Risks, and action items.

12.2.4. Task Summary

<b>Activity Duration:</b>	As defined in the project timeline
<b>Activity Location:</b>	N/A
<b>Contractor Staff Count:</b>	PM, QA Lead, Customer Support
<b>Contractor Artifacts:</b>	
A24. Transition to support meeting	
<b>Contractor Deliverables:</b>	
D56. Remediation of Defects according to transition plans	
D57. Final Project Services Audit report	
<b>County Deliverables:</b>	
C51. Signed Acceptance of final Project Services Audit report	

**TASK 12.3. Retained Funds Release Milestones**

The activities described in this Task shall be repeated for each of the milestones for retained funds release associated with Final Acceptance set forth in the Schedule of Milestones and Payments (Exhibit B).

For the purpose of Retained Funds Release Milestones, the scope of the Total Software Score (TSS) includes only the current and prior Activities listed in this table. TSS for the entire System must remain below 50 in all cases.

The following is the acceptance criteria to be applied to each respective milestone:

Milestone	Activities	Payout %	Acceptance Criteria
Payout 1	Levy Limits (20%) Notice of Value (NOV) Mailing (15%) Personal Property Self Reporting Form Mailing, 520 (5%) Valuation Relief Renewal Mailings (5%)	45%	The System must have operated with zero (0) SEV1 Defects for at least thirty (30) consecutive days after Go-Live and TSS is 20 or less.
Payout 2	Valuation Appeals (10%) Mobile Home Notice of Value Mailing (5%)	15%	The System must have operated with zero (0) SEV1 Defects for at least thirty (30) consecutive days after Go-Live and TSS is 20 or less.
Payout 3	Tax Roll Processing/File to Treasurer (5%) Rollover (5%) Business, Personal Property Valuation Notice Mailing (5%)	15%	The System must have operated with zero (0) SEV1 Defects for at least thirty (30) consecutive days after Go-Live and TSS is 20 or less.
Payout 4	DOR Sales Ratio Files (10%) Legal Class Verification (aka First and Final) Mailing (5%) Valuation Models/Sales Ratio Verification (10%)	25%	The System must have operated with zero (0) SEV1 Defects for at least thirty (30) consecutive days after Go-Live and TSS is 15 or less.

12.3.1. Contractor Activities

Prepare and deliver Track Acceptance form.

12.3.2. County Activities

Complete Track Acceptance form and return to Contractor.

12.3.3. Acceptance Criteria for Contractor Deliverables

1. Track Acceptance form format and use it in accordance with this SOW.

12.3.4. Task Summary

Release of retained funds per Final Acceptance milestones in accordance with Schedule of Milestones and Payments (Exhibit B).

<b>Contractor Deliverables:</b>	
D58.	Track Acceptance form, Payout 1
D59.	Track Acceptance form, Payout 2
D60.	Track Acceptance form, Payout 3
D61.	Track Acceptance form, Payout 4
<b>County Deliverables</b>	
C52.	Release of retained fees, Payout 1
C53.	Release of retained fees, Payout 2
C54.	Release of retained fees, Payout 3
C55.	Release of retained fees, Payout 4, Final Acceptance

1. PART FOUR: IMPLEMENTATION PLAN/SCHEDULE

This plan is notional and will be expanded into greater detail during the development of the Project Charter and Detailed Timeline.

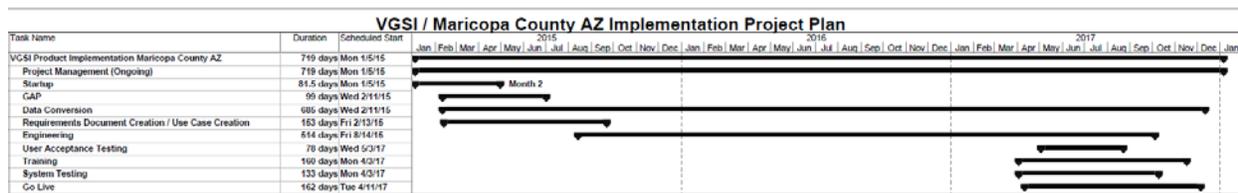




EXHIBIT B, PRICE AGREEMENT

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NIGP CODE: 208-82

CONTRACTOR'S NAME:

Vision Government Solutions, Inc

COUNTY VENDOR NUMBER :

20110055240

ADDRESS:

44 Bearfoot Road, Northborough, MA 01532

P.O. ADDRESS:

TELEPHONE NUMBER:

508-351-3600

FACSIMILE NUMBER:

508-351-3798

WEB SITE:

[www.vgsi.com](http://www.vgsi.com)

CONTACT (REPRESENTATIVE):

Jay Taranto

REPRESENTATIVE'S E-MAIL ADDRESS:

[sales@vgsi.com](mailto:sales@vgsi.com)

CONTRACTOR WILL ALLOW OTHER GOVERNMENTAL ENTITIES TO PURCHASE FROM THIS AGREEMENT.

1. PRICING

1.1. NOT TO EXCEED IMPLEMENTATION PRICING

\$10,989,814.00

1.2. YEAR 2014 GAP ANALYSIS

\$217,000.00

1.3. SOFTWARE LICENSING

\$2,455,500.00

1.4. ANNUAL MAINTENANCE

YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
\$	\$	\$	\$613,875	\$638,400
YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10
\$663,900	\$690,500	\$718,100	746,800	\$776,700
YEAR 11	YEAR 12	YEAR 13	YEAR 14	YEAR 15
\$815,500	\$856,300	\$899,100	\$944,100	\$991,300
YEAR 16	YEAR 17	YEAR 18	YEAR 19	YEAR 20
\$1,040,900	\$1,092,900	\$1,147,500	\$1,204,900	\$1,265,100

2. SCHEDULE OF MILESTONES

2.1. The parties acknowledge that payment for the Milestones hereunder be payable only upon the County’s acceptance of such Milestone, acceptance of which shall not be unreasonably withheld, delayed or conditioned. The Schedule of Milestones (as defined by the list in 2.2 below) is inclusive of the terms and conditions within the Master Agreement.

2.2. The Schedule of Milestones shall be as follows:

<b>Deliverable or Fee</b>	<b>Total Value</b>	<b>Retainage</b>	<b>Payment</b>	<b>Notional Payment Date</b>
Project Management Fee, per month, 36 months	\$50,305 / month	\$10,061 / month	\$40,244 / month	Monthly
2014 GAP Analysis	\$ 217,000	\$ -	\$ 217,000	12/10/2014
D5 Server/OS and DBMS Recommendation	\$ 15,000	\$ 3,000	\$ 12,000	1/12/2015
D4a Project Charter	\$ 25,000	\$ 5,000	\$ 20,000	1/16/2015
D7 Setup FTP site,PTS, TFS, Jira and related	\$ 40,000	\$ 8,000	\$ 32,000	1/26/2015
D4b Detailed Timeline	\$ 75,000	\$ 15,000	\$ 60,000	2/2/2015
D1 Kickoff Meeting Preparation	\$ 25,000	\$ 5,000	\$ 20,000	2/4/2015
License Payment #1 Cloud Access Only	\$ 810,315	\$ -	\$ 810,315	1/15/2015
D3 Kickoff Meeting	\$ 50,000	\$ 10,000	\$ 40,000	2/5/2015
D8 Shell Gap Analysis Document	\$ 18,750	\$ 3,750	\$ 15,000	2/13/2015
D9a Gap Workshop #1	\$ 18,750	\$ 3,750	\$ 15,000	2/24/2015
D11a Gap Workshop #1 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	3/3/2015
D19 Data Conversion Plan	\$ 102,100	\$ 20,420	\$ 81,680	3/4/2015
D9b Gap Workshop #2	\$ 18,750	\$ 3,750	\$ 15,000	3/10/2015
D20a Conversion Mapping Subset #1	\$ 20,420	\$ 4,084	\$ 16,336	3/13/2015
D11b Gap Workshop #2 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	3/17/2015
D9c Gap Workshop #3	\$ 18,750	\$ 3,750	\$ 15,000	3/24/2015
D11c Gap Workshop #3 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	3/31/2015
D9d Gap Workshop #4	\$ 18,750	\$ 3,750	\$ 15,000	4/7/2015
D11d Gap Workshop #4 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	4/14/2015
D9e Gap Workshop #5	\$ 18,750	\$ 3,750	\$ 15,000	4/21/2015
D20b Conversion Mapping Subset #2	\$ 20,420	\$ 4,084	\$ 16,336	4/24/2015
D11e Gap Workshop #5 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	4/28/2015
D21a Subset Conversion #1 Complete	\$ 20,420	\$ 4,084	\$ 16,336	4/30/2015
D9f Gap Workshop #6	\$ 18,750	\$ 3,750	\$ 15,000	5/5/20015
D11f Gap Workshop #6 Documentation	\$ 18,750	\$ 3,750	\$ 15,000	5/12/2015
D9g Gap Workshop #7 (Overflow Session)	\$ 18,750	\$ 3,750	\$ 15,000	5/19/2015
D9 Detailed GAP Session Complete	\$ 220,000	\$ 44,000	\$ 176,000	5/19/2015
D11g Gap Workshop #7 (Overflow Session) Documentation	\$ 18,750	\$ 3,750	\$ 15,000	5/27/2015
D11 Draft Gap Analysis Document	\$ 192,500	\$ 38,500	\$ 154,000	6/3/2015
D14b Requirements Document / Use Case Workshop #1	\$ 31,250	\$ 6,250	\$ 25,000	6/3/2015

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<b>Deliverable or Fee</b>	<b>Total Value</b>	<b>Retainage</b>	<b>Payment</b>	<b>Notional Payment Date</b>
D20c Conversion Mapping Subset #3	\$ 20,420	\$ 4,084	\$ 16,336	6/5/2015
D21b Subset Conversion #2 Complete	\$ 20,420	\$ 4,084	\$ 16,336	6/9/2015
D14a Delivery of Requirements Document / Use Case Document	\$ 62,500	\$ 12,500	\$ 50,000	6/9/2015
D14c Requirements Document / Use Case Workshop #1 Documentation	\$ 31,250	\$ 6,250	\$ 25,000	6/10/2015
D14d Requirements Document / Use Case Workshop #2	\$ 31,250	\$ 6,250	\$ 25,000	6/17/2015
D12 Final Document Delivered	\$ 231,250	\$ 46,250	\$ 185,000	6/24/2015
D14e Requirements Document / Use Case Workshop #2 Documentation	\$ 31,250	\$ 6,250	\$ 25,000	6/24/2015
D14f Requirements Document / Use Case Workshop #3	\$ 31,250	\$ 6,250	\$ 25,000	7/1/2015
D20d Conversion Mapping Subset #4	\$ 20,420	\$ 4,084	\$ 16,336	7/8/2015
D14g Requirements Document / Use Case Workshop #3 Documentation	\$ 31,250	\$ 6,250	\$ 25,000	7/9/2015
D14h Requirements Document / Use Case Workshop #4	\$ 31,250	\$ 6,250	\$ 25,000	7/16/2015
D21c Subset Conversion #3 Complete	\$ 20,420	\$ 4,084	\$ 16,336	7/17/2015
D14i Requirements Document / Use Case Workshop #4 Documentation	\$ 31,250	\$ 6,250	\$ 25,000	7/23/2015
D14j Requirements Document / Use Case Workshop #5 (Overflow)	\$ 31,250	\$ 6,250	\$ 25,000	7/30/2015
D14k Requirements Document / Use Case Workshop #5 (Overflow) Documentation	\$ 31,250	\$ 6,250	\$ 25,000	8/6/2015
D14 Draft Requirement Documents	\$ 1,068,000	\$ 213,600	\$ 854,400	8/6/2015
D20e Conversion Mapping Subset #5	\$ 20,420	\$ 4,084	\$ 16,336	8/14/2015
D21d Subset Conversion #4 Complete	\$ 20,420	\$ 4,084	\$ 16,336	8/25/2015
D17 Final Requirement Documents	\$ 962,000	\$ 192,400	\$ 769,600	9/21/2015
D20f Conversion Mapping Subset #6	\$ 20,420	\$ 4,084	\$ 16,336	9/25/2015
D21e Subset Conversion #5 Complete	\$ 20,420	\$ 4,084	\$ 16,336	10/2/2015
D20g Conversion Mapping Subset #7	\$ 20,420	\$ 4,084	\$ 16,336	10/30/2015
D21f Subset Conversion #6 Complete	\$ 20,420	\$ 4,084	\$ 16,336	11/10/2015
D20 Finalize Data Mapping Documents	\$ 20,420	\$ 4,084	\$ 16,336	11/30/2015
D21g Subset Conversion #7 Complete	\$ 20,420	\$ 4,084	\$ 16,336	12/16/2015
D21 Subset Conversion	\$ 102,100	\$ 20,420	\$ 81,680	12/17/2015
D31a License Payment #2 (Release 1 Acceptance)	\$ 810,315	\$ -	\$ 810,315	4/4/2016
D33a Release 1	\$ 482,250	\$ 96,450	\$ 385,800	4/4/2016
D23 Full Conversion	\$ 204,200	\$ 40,840	\$ 163,360	8/19/2016
D31b Marshall and Swift (Release 2)	\$ 120,000	\$ 24,000	\$ 96,000	10/3/2016
D33b Release 2	\$ 482,249	\$ 96,449	\$ 385,800	10/3/2016
D31c Other Interfaces (Release 3)	\$ 280,000	\$ 56,000	\$ 224,000	4/3/2017
D33c Release 3 - UAT Release	\$ 771,599	\$ 154,320	\$ 617,279	4/3/2017
D38 Training plan	\$ 114,800	\$ 22,960	\$ 91,840	4/4/2017

<b>Deliverable or Fee</b>	<b>Total Value</b>	<b>Retainage</b>	<b>Payment</b>	<b>Notional Payment Date</b>
D33c UAT Configuration and Installation	\$ 413,700	\$ 82,740	\$ 330,960	4/10/2017
D39 Training syllabus	\$ 172,200	\$ 34,440	\$ 137,760	4/11/2017
D25 UAT Conversion	\$ 204,200	\$ 40,840	\$ 163,360	5/1/2017
D40 Training Environment Configuration and Installation	\$ 472,800	\$ 94,560	\$ 378,240	7/18/2017
D33d Release 4	\$ 192,900	\$ 38,580	\$ 154,320	9/5/2017
D47 Final Configuration and Installation	\$ 295,500	\$ 59,100	\$ 236,400	10/19/2017
D42 Training Track Acceptance	\$ 287,000	\$ 57,400	\$ 229,600	11/16/2017
D30 Final Conversion Acceptance	\$ 102,100	\$ 20,420	\$ 81,680	12/8/2017
License Payment #3 Go Live Acceptance	\$ 834,870	\$ -	\$ 834,870	12/31/2017
D58 Retainage Payout 1		\$ -	\$ 942,931	2/15/2018
D59 Retainage Payout 2		\$ -	\$ 314,310	6/15/2018
D60 Retainage Payout 3		\$ -	\$ 314,310	9/15/2018
D61 Retainage Payout 4		\$ -	\$ 523,851	12/15/2018

2.3. Contractor shall prepare one invoice at the end of each month for all Milestones accepted or fees due in that month. Monthly invoices shall include any travel at cost in accordance with Appendix 2 Travel expenses shall be capped at \$512,804 through final acceptance.

3. SOFTWARE UPGRADES, WARRANTY, MAINTENANCE & ROADMAP/ENHANCEMENTS:

3.1. The Contractor shall make available to the County, at no additional charge, all Enhancements and Upgrades to the proposed software as they are released so long as the County is currently under the Contractor’s software maintenance agreement. The County shall decide at its discretion whether or not to take advantage of the updated version and support it under the maintenance agreement.

3.2. To ensure that documentation is consistent with the operating environment, updated documentation shall be delivered concurrently with every software fix-pack or software update.

3.3. The software warranty shall commence after 30 consecutive days with no significant failure, outage or event in software following the “go-live” cutover. If a significant system failure/outage/event occurs, the 30 day period will reset and begin again. The software warranty shall last for 60 days after the first 30 consecutive day period after “go-live” cutover without a significant software failure, outage, or event.

4. RATE CARD

The following labor rates shall apply for all services rendered additionally to this Agreement via a Change Order or Amendment.

Project management	\$ 175.00
Product consulting	\$ 175.00
Programming & product customization	\$ 175.00
General configuration support	\$ 150.00
Data conversion	\$ 150.00
Interface development	\$ 175.00
Training development (curriculum developer or technical writer)	\$ 175.00
Training (trainer)	\$ 150.00
Help desk support (regular business hours)	\$ 100.00
Help desk support (after business hours)	\$ 150.00



## EXHIBIT C, SOFTWARE MAINTENANCE AGREEMENT

SERIAL 13129 -RFP

### 1 Definitions

- 1.1 All capitalized terms used herein shall have the meanings attributed to them within the Agreement unless otherwise noted.
- 1.2 "Business Hours" shall mean 7:30am to 4:00pm Arizona Time, Monday through Friday, County holidays excluded.

### 2 Term and Automatic Renewal

- 2.1 The term of this Maintenance Schedule shall commence upon the execution of this Agreement, then continue through any Warranty Period and further continue for one (1) year from the expiration date of the Warranty Period ("Initial Term"). Thereafter, the term will continue with automatic renewals for additional successive one (1) year periods, unless written notice of non-renewal is delivered by either Party to the other not less than thirty (30) calendar days prior to the expiration date of the then-current term ("Renewal Term"). Both the Initial Term and any Renewal Term may be referred to collectively as the "Maintenance Term."

### 3 Maintenance Services Provided

- 3.1 During the Maintenance Term, upon and subject to the terms and conditions of the Agreement and this Schedule, Contractor will provide to County during Business Hours reasonable operational support and assistance as described below in connection with the use of the Software:
  - a) Corrections to the Installed Software and Documentation of Defects reported by County to Contractor, which Defects are caused by errors in the then-current release of the Installed Software, provided that such Defects are reported to Contractor no later than two (2) business days after the Defect is first recognized.
  - b) Enhancements to accommodate changes in Arizona statute.
  - c) Telephone or email support with respect to the Services delineated in Sections 3.1(a) hereof.
  - d) Contractor's obligation to provide a response pursuant to this Section 3.1 is void if the County does not allow reasonable access to the Installed Software for diagnostics and examination, or in the event of causes beyond the control of Contractor, including but not limited to acts of God, fire, flood, strike, national emergency or failures of communications facilities or lines.
- 3.2 Contractor shall use commercially reasonable efforts to respond to any request for support hereunder within one (1) business day of receiving such request.
- 3.3 Notwithstanding anything herein to the contrary, the Services to be provided hereunder shall not be covered by this Schedule, and shall be provided (if at all) on a time and materials basis, if the Software malfunctions due to or generates a Defect from:
  - a) Acts of God or natural disasters, including but not limited to fire, smoke, water, earthquakes, lightning or static electricity;

- b) Causes external to the Software such as, but not limited to, electrical power fluctuations or failures, lack of air conditioning or proper temperature control, accidents, burglary or vandalism;
- c) The neglect, misuse (including faulty repair or maintenance by Persons other than Contractor), or improper storage of the Software or the Designated Hardware on which the Software is installed, or other failure to comply with the instructions set forth in the Documentation or provide a suitable environment for the Installed Software;
- d) A modification or alteration of the Software not provided by Contractor;
- e) A malfunction of any equipment not provided by Contractor with which the Software is used or combined;
- f) Use of the Software in a manner for which it was not designed; or
- g) The failure of County to back-up its data or otherwise to fulfill any obligation under this Schedule or the Agreement, for the Installed Software supported hereunder.

3.4 This Schedule further shall not apply to, and the Services shall not be deemed to include:

- a) Development or engineering of the Software, unless Contractor shall deem such development or engineering necessary in its providing services under section 3.1 above;
- b) Supplies, accessories, media or other materials which are, by their nature, expendable or consumable, except for media which may be provided as part of the Services described in section 3.1 above;
- c) Any services, including, without limitation, installation, alterations, modifications, maintenance or removal of, or relating to any item not furnished by Contractor, and
- d) Any services related to work external to the Software, including, without limitation, electrical work, cable routing or changes that affect the Specifications or the County's equipment and other software.

3.5 Any corrections, updates, enhancements, or upgrades shall meet or exceed the same acceptance and system performance standards established in Statement of Work, Exhibit A, Part Three, §10.3.3 and Special Terms & Conditions, of Exhibit A, Part One, §1.5.

## **4 Warranty**

4.1 The Services Warranty as described within the Agreement shall be the exclusive warranty governing the Services provided within this Schedule.

## **5 County Responsibilities**

5.1 County shall install and maintain, at its expense, hardware (including without limitation a central processing unit, local area network or network server) and communication equipment (including, without limitation, modem and remote access) that is compatible with the Software and that meets Contractor's minimum hardware configuration requirements.

5.2 County shall ensure that the environment, space and access to and availability of power comply, at all times, with Contractor's minimum space and suitability requirements. County shall ensure that Contractor has full, free and safe access to the Software and County's facilities and equipment for purposes of fulfilling its obligations hereunder. County shall provide (a) (i) media (tapes, floppy disks and/or disk packs), (ii) supplies, (iii) a current back-up of the current version of the Software, (iv) data, the use of hardware and/or other equipment, (v) other software, communications facilities, and (vi) other materials (other than tools) required to maintain and/or test the Software; (b) reasonable secure storage for such County-provided materials; and (c) reasonable secure storage for such equipment and tools as Contractor elects to store at County's premises.

5.3 County shall back-up all files each day according to industry accepted standards. Contractor shall not be responsible for, or be liable with respect to any loss of or damage to County data from failure of County to back-up its files or otherwise.

5.4 County shall bear sole responsibility to correct problems or Defects in compatibility between the Software and the Designated Hardware or other software resulting from modifications of the Software, Designated Hardware and such software by any Person other than Contractor.



## EXHIBIT D, SOFTWARE LICENSE AGREEMENT

SERIAL 13129 -RFP

## 1 Definitions

- 1.1 “Defect” shall mean reproducible errors in the Software which prevent the Software from performing in all material respects in accordance with the Documentation, when operated in the proper environment and used in accordance with all applicable instructions.
- 1.2 “Designated Hardware” shall mean the central processing unit (CPU), local area network, or network server or other hardware specified or permitted by Contractor designated by the Licensee and in compliance with any known required specifications, and if applicable, the number of users set forth on the applicable Schedule or other addendum attached hereto and made a part hereof. “Documentation” shall mean the user documentation describing the Software and providing guidelines for its use, and any and all additions and updates thereto provided to Licensee by Licensor, and any portion of the foregoing.
- 1.3 “Enhancement” shall mean collectively any modification, addition, or change to the Software that provides error corrections or efficiency alterations to the Software, designated as such in Licensor’s sole discretion. Enhancements are provided by Licensor to Licensee under this Agreement and/or pursuant to an applicable Schedule or other addendum, without an additional charge as part of warranty or maintenance Services; provided Licensee has not breached this or any other Agreement between Licensor and Licensee. Licensor will designate Enhancements by indicating a change in the second digit of the software release number {e.g. the first Enhancement to product “x” version 7.0 will be designated 7.1}.
- 1.4 “Installed Software” shall mean the specific Software being licensed to Licensee by Licensor as specified on any applicable Schedule, without regard to the method by which Licensee accesses such Software.
- 1.5 “License” shall mean the license granted hereby to the Licensee by the Licensor for the Software.
- 1.6 “Location” shall mean the permitted location for the Designated Hardware, as listed on the applicable Schedule(s) annexed hereto and made a part hereof.
- 1.7 “Module” shall mean a dependent software program that works with the Software but provides separate and optional functionality, which may be offered to Licensee for an additional charge.
- 1.8 “Person” shall mean any individual, partnership (general, limited or otherwise), limited liability company, corporation, joint venture, trust, trustee, unincorporated association, proprietorship or other legal entity, or any government, agency or subdivision thereof.
- 1.9 “Prices” shall mean the then-current list prices of Licensor for Software or Services. The price list in effect on the date of this Agreement may be annexed hereto as an applicable Schedule.
- 1.10 “Schedule” shall mean any additional document that is attached hereto, made a part hereof and incorporated into this Agreement by reference, that is executed by both Parties.
- 1.11 “Services” shall mean all the conversion, support, update, modification, installation, implementation, maintenance, consulting, training or other services provided to Licensee by Licensor or any designee of Licensor, pursuant to this Agreement and any applicable Schedule.
- 1.12 “Software” shall mean the Installed Software and any and all Enhancements and Upgrades, custom and other software hereafter provided to or obtained by Licensee pursuant to this Agreement, any other agreement between Licensee and Licensor, whether in object code, source code or any other form, and any portion of the foregoing. The Software may be further defined in any applicable Statement of Work.

- 1.13 “Statement of Work” shall mean a specific type of Schedule that specifies, among other things, the Software and Services being purchased and/or licensed by Licensee, and the number of users authorized to use the Software.
- 1.14 “Upgrade” shall mean collectively any significant modifications or changes to the Software which provides new functionality and/or interoperability, designated as such in Licensor’s sole discretion. Upgrades are provided by Licensor to Licensee pursuant to an applicable Schedule. Licensor will designate an Upgrade by indicating a change in the first digit of the software release number {e.g. the next Upgrade to product “x” version 7.0 will be designated 8.0}.
- 1.15 “Warranty Period” shall mean the 90-day period from the acceptance of the Installed Software, assuming zero errors in the first 30 days. See Pricing Agreement, Exhibit B, §3.3.

## **2 License Grant and Restrictions**

- 2.1 General. The Licensor represents that it has the right to grant the License hereunder. The Installed Software and its related Documentation are licensed, not sold, to Licensee for use only under the terms of this Agreement.
- 2.2 License Grant. Upon and subject to the terms and conditions of this Agreement, Licensor grants to Licensee, and Licensee accepts, a non-transferable, limited, non-exclusive perpetual License to: (i) use the Installed Software in object code form as limited below and by any applicable Schedule; (ii) use the Installed Software only for Licensee’s internal business needs; (iii) use the Documentation to support the use of the Installed Software and/or Service(s); and (iv) make one (1) archival copy of the Documentation and Installed Software that is installed on Designated Hardware provided Licensee affixes to any such copy all copyright, confidentiality, and proprietary notices that appear on the original, Licensee gives written notice to Licensor of the existence of such archival copy, and such archival copy is subject to all limitations set forth in this Agreement. All rights not expressly granted hereunder shall be reserved to Licensor. Additionally, Licensee shall not, sublicense, sell, rent, transfer, distribute or otherwise commercially exploit or make the Software or Documentation available to any third-party. Licensee and all of its users who have the right to use the Installed Software on behalf of Licensee under this Agreement, will be bound and comply with this Agreement. This License grant is effective upon Licensor’s acceptance of this Agreement and Licensee’s order, indicated by the signature on this Agreement of an authorized signatory of Licensor.
- 2.3 Restrictions. Licensee shall not, directly or indirectly (i) reverse engineer, decompile or disassemble the Software, or otherwise attempt to derive the source code of the Software, or any portion thereof; (ii) make more copies of the Software and the Documentation than is specified in this Agreement or allowed by applicable law, despite this limitation; (iii) publish or otherwise display the Software and/or the Documentation, including any screenshots of the Software, for others to copy; (iv) modify or create a derivative work of any part of the Software or Documentation; (v) use the Software other than as, or for any purpose other than that, set forth in the Documentation or in any application that may involve risks of death, personal injury, severe property damage, or environmental damage; and/or (vi) file copyright or patent applications that include the Software or Documentation or take any other action that may transfer any intellectual property rights in the Software or the Documentation to any Person other than Licensor. The Licensee recognizes that the Software and/or Documentation is itself proprietary information and shall use at least the same degree of care as it uses to protect its own proprietary information of similar kind, but in no event shall such care be less than commercially reasonable, so as to protect the Software and Documentation without limiting the generality of the foregoing. For avoidance of doubt, the archival copy of the Installed Software and Documentation Licensee is permitted to keep hereunder may be used only to comply with Licensee’s record keeping obligations under applicable law and for no other purpose.
- 2.4 Provision of Installed Software. Licensor shall provide to Licensee (i)(a) the object code for the Installed Software or (b) remote access to the Installed Software and (ii) Documentation for the Installed Software. Maintenance is available only pursuant to a separate Schedule that may be attached to this Agreement.
- 2.5 Locations. In the event Licensee receives the object code for the Installed Software (rather than remote access thereto) Licensee shall use the Installed Software only on the Designated Hardware and at the Designated Location(s). Licensee shall have the right to change the Location of the Designated Hardware and to upgrade the Designated Hardware to use the Installed Software on a central processing unit that replaces the Designated Hardware. In no event shall Licensee have the right to use or permit the use of

the Installed Software simultaneously on more than one central processing unit in excess of the permitted number of users as set forth on the applicable Schedule.

- 2.6 Termination of Agreement. If the County terminates this agreement the Licensor hereby grants to Licensee a nonexclusive, royalty-free, perpetual license to use any Software and Documentation that were accessible to and provided the County during the term of this Agreement. The grant foregoing license shall be subject to the County's full payment of any amounts owed for the Software and Documentation and shall be revocable if the County is in material breach of this Agreement. The County and Licensor agree that upon such termination the County retains the obligation to protect the confidential nature of the software and that Licensor has no further obligation to provide maintenance, updates, or any service to ensure the performance of the Licensed Materials after the termination date.

### 3 Protection of Proprietary Rights

- 3.1 Proprietary Rights. Licensee acknowledges that the Software and Documentation have been and shall be developed by Licensor at great expense to Licensor, that the Software and Documentation are proprietary to Licensor and that Licensor has, and shall have and retain, full title, ownership, proprietary and other intellectual property rights in the Software and Documentation, including without limitation, copyright, trademark, service mark, trade secret, trade name and other intellectual property rights (collectively the "Proprietary Rights"). Further, Licensee acknowledges that the Software is designed as a standard product and not as a customized product created exclusively for the Licensee.
- 3.2 Licensee's Rights. Licensee acknowledges that the rights granted to Licensee hereunder are only the rights of a Licensee. Licensee acknowledges and agrees that: (i) no title or ownership of the Software or Documentation is transferred to Licensee hereby; (ii) the Software and Documentation and all Proprietary Rights are, and shall remain, the exclusive property of Licensor (or its licensors); and (iii) except for the License granted in Section 2 above, Licensee shall not have any right, title or interest in the Software or Documentation. Licensee shall not make any claim or representation of ownership, or act as the owner, of any of the Software or Documentation. Licensee agrees not to remove, change or deface, and shall include, Licensor's copyright notice and notice of its Proprietary Rights on each and every item of Software copied or reproduced.
- 3.3 Licensor's Rights. Licensor acknowledges that it has no right to or interest in the data processed by Licensee using the Software, except that of limited use in the installation or maintenance of the Software.
- 3.4 Confidentiality. Licensee shall keep confidential the Software and other information of Licensor which is confidential, proprietary or nonpublic ("Confidential Information") and shall not disclose the Confidential Information to any Person, except to employee(s) of Licensee with a need to know the Confidential Information in order for Licensee to perform its obligations under this Agreement. Confidential Information shall not include information which (i) is in the public domain at the time of disclosure or enters the public domain through no act or omission of Licensee, (ii) Licensee's written records in existence at the time of disclosure show was known to Licensee at the time of disclosure, (iii) is freely disclosed to Licensee, without restriction, by a third party without a duty of confidentiality to Licensor, and (iv) Licensee's written records show to have been developed independently by Licensee by personnel without access to the Confidential Information.
- 3.5 Notification of Unauthorized Use. Licensee shall promptly notify Licensor upon becoming aware of the possession, use, or knowledge of any Confidential Information by a Person not authorized by this Agreement to have such possession, use or knowledge. Licensee shall promptly furnish to Licensor full details of such possession, use or knowledge and shall use reasonable efforts to cooperate with Licensor, at Licensor's expense, in any action taken or deemed necessary by Licensor to protect the Confidential Information or Proprietary Rights.

### 4 Warranties

- 4.1 Software Warranty. Licensor warrants to the Licensee that the Installed Software shall operate substantially in accordance with its Documentation for duration of the Warranty Period ("Software Warranty"). Licensee's exclusive remedy and Licensor's exclusive obligation for any breach of this Software Warranty shall be the correction of Defects or replacement by Licensor of the nonconforming portion of such Installed Software, at Licensor's sole election. The failure of Licensee to notify the Licensor within the Warranty Period of the failure of the Installed Software to conform to the Documentation therefore shall relieve Licensor of its obligations and liabilities under this section of this

Agreement. Licensee's notice shall disclose the items within the Documentation to which such Installed Software fails to conform and the manner in which the Installed Software fails to conform with sufficient specificity to permit Licensor to reproduce and correct such nonconformity. In the event Licensor determines, in its sole discretion, that it cannot, using commercially reasonable efforts, correct a Defect or replace such nonconforming portion of the Installed Software, Licensee may return the Installed Software and Documentation and receive a refund of the License fee paid hereunder. Licensee's right to return the Installed Software and Documentation and receive a refund hereunder shall expire at the expiration of the Warranty Period. This Software Warranty shall be null and void upon, and shall not apply to any Defect or nonconformity caused by (i) any modification or alteration of the Software or Licensee's equipment other than by or with prior approval of Licensor, (ii) misuse or abuse of the Software or Documentation, (iii) negligence or wrongdoing of Licensee in connection with the Software or Documentation, (iv) *force majeure* events as set forth in this Agreement, (v) malfunction of any of Licensee's equipment, or (vi) use of the Software or Documentation in any manner inconsistent with this Agreement or the Documentation therefor. Licensee shall pay Licensor at Licensor's then-current time and materials rates for its Services in the event Licensee makes a Software Warranty claim that is null and void or inapplicable hereunder. The Software Warranty does not apply to any portion of the Software, Documentation, supplies or materials which are, by their nature, consumable or expendable. The Warranty Period for Enhancements will run contiguously with the Software Warranty for the enhanced Installed Software, unless Licensor notifies Licensee that a longer Warranty Period applies upon delivery of the Enhancement to Licensee. The Warranty Period for Upgrades shall be as set forth in the Schedule or other agreement pursuant to which the Upgrade is provided.

- 4.2 Services Warranty. Licensor warrants that all Services will be performed in a professional and workmanlike manner, consistent with then-current industry standards ("Services Warranty"). Licensee's remedy for a breach of the Services Warranty will be, at Licensor's option, either to (i) re-perform such Service(s); or (ii) to provide Licensee a refund for the allegedly defective Service(s). Such remedy will only be available if Licensee notifies Licensor in writing within thirty (30) calendar days of the completion of such Service(s).
- 4.3 Warranty Exclusions; Exclusive Remedy. Licensor does not make any, and expressly disclaims, all representations and warranties, whether oral or written, express or implied, or arising by usage of trade or course of dealing, other than the warranties expressly made in this Agreement, including, without limitation, the warranties of merchantability, fitness for a particular purpose and non-infringement. Licensor does not warrant that the Software will satisfy, or may be customized to satisfy, all of Licensee's requirements or that the use of the Software will be uninterrupted or error-free. The remedies set forth herein shall be the sole and exclusive remedies of Licensee.

## 5 Maintenance Services and Enhancements

- 5.1 Commencement of Maintenance Service. Licensee acknowledges that this Agreement includes certain warranties for the Installed Software and Services, and that these warranties are separate from any Installed Software maintenance service. The commencement date of maintenance service and whether or not the maintenance service period overlaps with any Warranty Period will depend on the maintenance service purchased by Licensor.
- 5.2 Enhancements During Warranty. Licensor shall provide to Licensee during the Warranty Period, at no additional expense to Licensee, any correction or Enhancement provided by Licensor, as determined by Licensor in its sole discretion. After the expiration of the Warranty Period, Enhancements and Upgrades shall be available to Licensee as maintenance services, available for purchase pursuant to a maintenance Schedule. Enhancements and Upgrades shall also be available to licensees who have not purchased a maintenance Schedule and are not and have not been in breach of any agreement between such licensee and Licensor, on a time and materials basis, at Licensor's then-current terms and conditions, including Prices.

## 6 Limitation of Liability; Indemnification

- 6.1 Limitation of Liability. Licensor shall not be liable for any loss or damage that Licensee suffers or claims to have suffered other than, subject to the limitations set forth below, a loss or damage directly caused by Licensor's negligence or willful misconduct. Both Parties agree that Licensor has no liability whatsoever for Licensee's data or equipment.

- 6.2 Exclusion of Consequential Damages. In no event will either Party be liable to the other for (i) incidental, consequential, indirect, special, punitive or exemplary damages, whether claimed under contract, tort or any other legal theory, including but not limited to loss of use, revenue or profit, or (ii) loss of or damage to Licensee data or programming, in either event whether or not such Party had notice of the possibility of such damages occurring or should have known of such possibility. Notwithstanding anything to the contrary set forth in this Agreement, Licensee and Licensor expressly agree that the maximum aggregate liability of Licensor for all claims under this Agreement or otherwise shall be the amount paid by Licensee to Licensor hereunder during the twelve months immediately preceding the event causing the loss or damage to Licensee. The representations and warranties made in this Agreement extend only to Licensee and its permitted successors and assigns. Any action against Licensor not brought within six (6) months after the cause of action accrues or arises shall be deemed barred.
- 6.3 Indemnification. Licensee shall, to the fullest extent permitted by applicable law, indemnify and hold harmless Licensor, its agents, employees, officers, directors, stockholders, successors and assigns from and against any and all liabilities, losses, damages, claims, suits and expenses, including, without limitation, reasonable attorneys' fees, of whatsoever kind and nature imposed on, incurred by, or asserted against Licensor, its agents, employees, officers, directors, stockholders, successors and assigns relating to or arising out of any failure on the part of Licensee to perform or comply with the terms of this Agreement.

## 7 Intellectual Property Indemnification

- 7.1 Defense and Cooperation. Licensor shall, at its own expense with counsel of its own choosing, defend any claim made against Licensee asserting that the Software infringes upon the United States patent or copyright rights of a third party, provided that Licensee provides immediate notice of such claim and Licensor has full control of such defense, the right to settle or compromise such claim and the incurring of any expense related thereto. Licensee shall fully cooperate with Licensor in any such defense.
- 7.2 Infringing Software. In the event of any claim described in Section 7.1 "Defense and Cooperation" above, or upon Licensor's determination that such a claim may occur, Licensor shall have the right, at its option, to (i) procure for Licensee the right to continue using that portion of the Software claimed to be infringing, or (ii) require Licensee to cease using that portion of the Software claimed to be infringing and replace such portion with other software to make the Software non-infringing.
- 7.3 Failure of Notification. The failure of Licensee to notify Licensor of such claim shall relieve Licensor of its obligations and liabilities under this Section 7 "Intellectual Property." Licensor shall have no liability or obligation to Licensee under this Section 7 if any such claim is made by an affiliate of Licensee or is based upon, arises out of or results from (i) any product or information or data not provided by Licensor, (ii) the failure of Licensee to use Enhancements or Upgrades to the Installed Software, (iii) modification or alteration of the Software by a Person other than Licensor, (iv) misuse or abuse of the Software, (v) negligence or wrongdoing of Licensee or any malfunction, modification or alteration of Licensee's equipment, (vi) *force majeure* events set forth in this Agreement, or (vii) use of the Software in any manner inconsistent with this Agreement or the Documentation.
- 7.4 Exclusive Remedy. Section 7.1 "Defense and Cooperation" specifies the entire liability of Licensor and the exclusive remedy of Licensee with respect to any claim that the Software infringes the intellectual property rights of any third party or a breach of Section 2.1 "General" of this Agreement.

## 8 Term and Termination

- 8.1 Term. This Agreement shall commence as of the latter date of both Parties' signatures and continue until terminated, as set forth below.
- 8.2 Termination for Material Breach. Licensor shall have the right, upon thirty (30) business days' notice to Licensee, to terminate this Agreement upon Licensee's breach of any of the terms and conditions of this Agreement or any other agreement between Licensor and Licensee and shall have the right to cease performance of its obligations hereunder, without notice, in the event Licensee breaches any of the terms and conditions of this Agreement or any other agreement between Licensor and Licensee. This Agreement shall automatically terminate in the event Licensee is unable to pay debts as they come due, enters into suspension of payments, moratorium, reorganization or bankruptcy, admits in writing its inability to pay debts as they mature, suffers or permits the appointment of a receiver for its business or

assets, or avails itself of or becomes subject to any other judicial or administrative proceeding related to insolvency or protection of creditors' rights (and, if such action or proceeding is involuntary on the part of Licensee, such action or proceeding is not dismissed within sixty (60) days).

- 8.3 Effect of Termination. Immediately upon the termination of this License, for any reason, Licensee shall deliver to Licensor all copies in Licensee's possession of the Software and Documentation, in whatever form, shall destroy any copies of materials containing Confidential Information, and shall certify in writing under oath that all materials required to be delivered to Licensor or destroyed have been so delivered or destroyed. Notwithstanding the foregoing, Licensee shall be entitled to maintain one copy of the Software in its possession, solely for records retention and/or archival purposes, which copy Licensee shall destroy as soon as permissible under applicable records retention laws.
- 8.4 Obligations after Termination. The termination of this Agreement shall be without prejudice to any rights of either Party against the other and such termination shall not relieve either Party of any of its obligations to the other existing at the time of termination.
- 8.5 Additional Remedies Due to Breach. Licensee acknowledges that, because of the confidential and proprietary nature of the Software, neither termination of this Agreement, nor arbitration, nor would an action at law be an adequate remedy for a breach by Licensee of Sections 2, "License Grant and Restrictions" and 3, "Protection of Proprietary Rights" of this Agreement. Accordingly, Licensee agrees and consents that in the event of such a breach, in addition to all other remedies which the injured Party may have, the injured Party shall be entitled to relief in equity, including a temporary restraining order, temporary or preliminary injunction and permanent injunction to restrain the continuation of any such breach or to compel compliance with the provisions of this Agreement.
- 8.6 Surviving Sections. Notwithstanding anything to the contrary in this Agreement, 2.3, "Restrictions"; 3, "Protection of Proprietary Rights"; 6, "Limitation of Liability and Indemnification"; 7, "Intellectual Property"; 8, "Term and Termination" shall survive expiration or earlier termination of this Agreement.



APPENDIX 1, FUNCTIONAL AND TECHNICAL REQUIREMENTS MATRIX

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Contractor attests to and hereby agrees to provide County with the following functional requirements as described by County and responded to by Contractor. The parties acknowledge that any striked items are expressly removed from the list of requirements and are not included.

Subsection	ID	Requirement Description	Response	Config	Comments	Module	FIT/GAP	Cost	Dependent	Dependency
Subsection 01 – User Interface	UI01	All components of the System share a common user interface.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI02	Supports Windows standard capabilities, such as copy, cut & paste, multiple windows open simultaneously, split screen, cascading, undoing complete edit changes, etc.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI03	Ability to open multiple instances of the System.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI05	Ability to pause or cancel a job or process in order to modify, reconfigure, or otherwise discontinue.	10_Available	Yes	The ability exists in the application to stop a recalculation job; however, other jobs such as Comp Sales Extract, Sales Extract, Imports and Exports are not able to be stopped. The cost estimate would carry the ability to stop additional jobs other than just recalculation.	Vision CAMA /AA	GAP	\$ 10,500.00		
Subsection 01 – User Interface	UI11	Ability to sort results of a query by user selected field(s).	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI12	Proposed data grid provides compound filter and sort functionality.	10_Available	Yes	The grids do have simple filtering capabilities but not compound filters.	Vision CAMA /AA	GAP	\$ 10,500.00		
Subsection 01 – User Interface	UI13	Ability for County to configure the data attributes presented when viewing the data grid for a particular entity (account, parcel, person, etc.).	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI14	Ability to search by exact word/number/phrase or a portion of a word or number.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI15	Ability to bookmark or "parking lot" a record or process to address at a future date/time.	10_Available	Yes	Extension of workflow functionality to allow the user to resume a workflow exact where it was left off and not having to start from the beginning.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 01 – User Interface	UI20	Provides County-defined fields and associated tables.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI21	Allows County to configure the layout of each solution screen.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI22	<del>Provides configurable summary screens for each primary entity.</del>	<del>10_Available</del>	<del>Yes</del>	<del>undefinable per Maricopa and Vision</del>	<del>Vision CAMA /AA</del>	<del>NA</del>			

Subsection 01 – User Interface	UI30	Provides online help for all areas of the solution including general help and context-sensitive help (screen and field level).	10_Available	Yes	Context sensitivity help is a feature to the system at the screen level. The GAP is work required for additional context sensitive due to Maricopa requirements.	Vision CAMA /AA	GAP	\$ 28,000.00		
Subsection 01 – User Interface	UI31	Ability for County to access and customize all levels of online help and other features.	6_Moderate	Yes	Maricopa desires the ability to customize Vision help. This cost represents an ability for Maricopa to had its own help file to the application. This is not an integrated help file but a stand alone that the application could use.	Vision CAMA /AA	GAP	\$ 21,000.00		
Subsection 01 – User Interface	UI40	Ability to present all assessments for a given account on a single screen (e.g., Real Property, Personal Property, Special Assessments, etc.).	10_Available	Yes	Vision currently displays a summary of many values on a single; however, Maricopa requires additional fields to be displayed on a summary screen . This cost represent the ability to display all the needed values on one screen.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 01 – User Interface	UI41	Ability to reference from a single screen all related values for a given property account number.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 01 – User Interface	UI42	Ability to move between screens and programs without the need to reenter the property account number (i.e., maintains context when navigating).	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 02 – Workflow	WF01	Provides workflow tracking functionality supporting recognition of work, status of assignments, individual workload, and associated planning reports.	10_Available	Yes	Workflow is a current GAP with the Vision software as development is in progress. The cost represents the required expansion to workflow to meet the needs of Maricopa. This is a general bucket that covers some but not allow of the workflow features. When Vision saw a feature that could stand independent from the core workflow we added additional cost.	Vision CAMA /AA	GAP	\$ 255,500.00	Yes	WF01
Subsection 02 – Workflow	WF02	Workflow management functionality provides system-generated notification (via email, screen pops, etc.) which is configurable by Maricopa County.	10_Available	Yes	This contains some additional notification mechanisms that were not part of Vision's original workflow specification.	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	WF01

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Subsection 02 – Workflow	WF05	Ability to flag parcels/accounts/multiple numbers/lesser numbers for review.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 02 – Workflow	WF06	Ability to attach documents such as correspondence letters, appeal notes, permits, sales affidavits, etc. to the workflow task.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF07	Ability to link workflow task(s) to a parcel(s), account(s), or multiple number or lesser number.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF20	Ability to schedule and route field activities in a manner that optimizes travel time and travel distance.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF21	Ability to create tasks/inspections manually or automatically based on predefined events.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF22	Ability to associate multiple tasks/inspections with a parcel(s), account(s), a multiple number, or a lesser number.	8_Minimum	Yes	GAP relates to support of the lesser number.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 02 – Workflow	WF23	Ability to create tasks in mass upon import of standard format electronic file from permit department or other area.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF25	Ability to automate task assignment based on conditions.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF26	Ability to group tasks and create an associated batch for assignment and progress tracking.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF27	Ability to assign tasks in a batch (i.e. assign a batch of deeds to a single individual).	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF28	Ability to define geographic areas of responsibility for task assignment.	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF29	Ability to reassign tasks (with appropriate security).	10_Available	Yes	GAP but included in the base workflow cost	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 02 – Workflow	WF30	System allows for display of task summary statistics in graphical format (i.e. pie charts displaying task type breakdown per employee).	10_Available	Yes	Workflow performance reporting is a GAP with Vision's current requirements. This cost represents the creation of the summary screen to display the data in graphical as well as tabular form.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01

Subsection 02 – Workflow	WF31	Provides Business Intelligence tools allowing for review of task summary statistics (i.e. total percentage of appeals completed to date for the roll year, number of parcels inspected in a given period by employee or geographic area, etc.).	8_Minimum	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE01	Provides real-time edit and input capabilities parcel and record maintenance activities (not dependent on scheduled or batched update)	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE02	Ability to set required fields without extensive programming or Contractor intervention.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE03	Supports the implementation of error display and warning reports (validity checks) during data entry to aid in identifying data entry errors.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE04	Supports the implementation of validity checks based on a value range of a numeric field or the relationship between fields.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE05	Supports user-definable defaults, auto-populated fields, and data entry limits for individual fields.	10_Available	Yes	Vision does support the use for pick lists for set data entry limits. The gap exists for user definable defaults as well as auto populated fields.	Vision CAMA /AA	GAP	\$ 8,400.00		
Subsection 03 – Data Entry	DE06	Ability to configure a visual indication of mandatory fields (different shading, color, or similar).	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE07	Supports locking of fields and records while in edit mode in user defined circumstances.	10_Available	Yes	Vision locks records when parcels being worked on. The GAP is the ability to lock only certain parts of a parcel (i.e. owner and deed).	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 03 – Data Entry	DE08	Provides facility for County configuration and control of application field edit logic.	10_Available	Yes	Vision has some dependent editing logic but it is related to comments fields being required when selecting overrides. This functionality would need to expand to support more generic dependent field logic.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 03 – Data Entry	DE10	Ability to select a collection of properties and perform mass update of characteristics.	10_Available	Yes		Vision CAMA /AA	FIT			

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Subsection 03 – Data Entry	DE11	Ability to select records based on a range or selection criteria and perform a mass data change.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE20	Supports configuration of user confirmation before modifying or deleting a parcel/record/multiple number/lesser number.	6_Moderate	Yes	Many of the screens do confirm deletions; however, not all the screens. This cost is to extend this functionality to all screens and to allow some configuration.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 03 – Data Entry	DE21	Supports bar coding functionality (i.e. bar coding of valuation notices and other documents).	6_Moderate	Yes	Vision does not currently support printing or reading of bar codes. The cost would allow us to add the functionality.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 03 – Data Entry	DE22	Ability to activate, inactivate, and reactivate a parcel(s), account(s), a multiple number, or a lesser number.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE23	Ability to retain all parcels/records/multiple numbers/lesser numbers when inactivated and identify them as such on all screens and reports.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE24	Ability to configure the solution to specify that inactive parcels/records/multiple numbers/lesser numbers are omitted from system counts or totals.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 03 – Data Entry	DE25	Ability for system administration staff to archive inactive parcels/records/multiple numbers/lesser numbers as required.	6_Moderate	Yes	Vision marks parcels as inactive. Currently, no utility exists to remove inactive parcels after a period of time. These costs would allow Vision to create a tool.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 04 – Case Management	CM01	Provides internal case management functionality for the tracking of appeals, litigation and related property owner inquiries.	10_Available	Yes	Vision does not have a case management module.	Vision CAMA /AA	GAP	\$ 612,500.00		
Subsection 04 – Case Management	CM02	Provides for the assignment of unique case/appeal numbers.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM03	Ability to identify and link related parcels or accounts to a case.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM04	Ability to assign a status to each appeal and/or related activity.	10_Available	Yes		Vision CAMA /AA	FIT			

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Subsection 04 – Case Management	CM06	Ability to define and monitor litigation cases as a system workflow distinct from other case types.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM07	Ability to define and monitor Assessor Level appeals (Notice of Value Appeals, Notice of Proposed Corrections and Appeals, Notice of Claim Appeals) as a system workflow distinct from other appeal types.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM08	Ability to define and monitor Notice of Change Appeals as a system workflow distinct from other appeal types.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM09	Ability to monitor State Board Appeals as a system workflow distinct from other appeal types.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM10	Provides an appeal/litigation summary screen with land characteristic summary, history of valuation changes, tax history, submarket adjustments history, etc.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM11	Ability to define and monitor Superior Court Appeals (ST Cases, Tax Court Cases and Civil Cases) as a system workflow distinct from other appeal types.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM15	Provides case management functionality for litigated property.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM17	Ability to record court case number associated with litigation independent of system-generated case number.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM20	Ability to create and store form letters associated with a case.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM21	Ability to store, display and print all forms, letters, comparable sale grids and any other correspondence sent to a property owner.	10_Available	Yes		Vision CAMA /AA	FIT			

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Subsection 04 – Case Management	CM22	Ability to record and track the receipt and subsequent lifecycle of a Notice of Claim.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM23	Ability to store date information regarding request for signature on appeal.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM24	Ability to generate correspondence to taxpayers regarding their case/appeal/hearing.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM25	Ability to track status of correspondence sent to property owners which require a response and capture resulting response.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM26	Ability to associate scanned documents with related property account.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM27	Ability to provide bar coding on appeal correspondence.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM28	Ability to distinguish parcels/accounts with cases that have been received without proper signature or supporting documentation.	8_Minimum	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM40	Ability to manage commitments in order to track active tasks, assignments, and due dates.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM41	Ability to designate entries by Assessment Year, so notes and work for one assessment year are kept separate from the next assessment year.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM42	Provides date & time stamped comment fields for cases.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM50	Ability to configure workflow processing to automatically flag parcels for review, assign to a specified workgroup, etc. for cases.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM51	Ability to configure default values for a new case that inherits values for an indicated related record (values, building characteristics,	6_Moderate	yes	Vision does not have a case management module. This is an additional cost on top of the base case management	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01

		legal description, etc.)			requirements.					
Subsection 04 – Case Management	CM52	Ability to record and track status on case-related workflow steps or action items.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM53	Ability to determine appropriate case type (standard vs. small claims) by evaluating associated data and applying County-defined criteria (primary resident, <\$2M in value, etc.).	10_Available	Yes	Vision does not have a case management module. There is not cost here as Vision believes this functionality will be achieved via the report wizard or a custom workflow rule.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM54	Ability to assign case to appropriate workgroup by evaluating associated data and applying by County-defined criteria.	10_Available	Yes	Vision does not have a case management module. There is no cost here as Vision believes this functionality will be achieved via the report wizard or a custom workflow rule.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 04 – Case Management	CM60	Ability to track related parties associated with a given account, case, parcel, etc.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM61	Ability to recognize where cases and/or steps in a case have been assigned to an external party (cases expedited to County Attorney).	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM62	Ability to represent the relationship between a case and a given parcel, account, and taxpayer.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM63	Ability to define to which associated parties system-generated correspondence shall be sent (agent only, the property owner only, or both).	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM64	Ability to define authorities for each party (tax agent, attorney, and/or property owner) on each property.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM65	Ability to maintain information on one or multiple agents per property	8_Minimum	yes	Vision does not have a case management module. This is an additional cost on top of the base case management	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01

					requirements.					
Subsection 04 – Case Management	CM66	Ability to assign multiple properties to one agent	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM68	Ability to define agent - company relationship and represent either perspective.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM70	Supports the creation of supporting appeal documentation in the format of comparable sales.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM71	Ability to reference and retrieve parcel's certified assessed value for the year selected and any newly published values that are not yet certified but have been mailed to the property owner.	10_Available	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM72	Ability to reference and retrieve all value changes to the certified assessed value from the active case record.	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM73	Provides single print capability for case (appeals, litigation) package generation.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 21,000.00	Yes	CM01
Subsection 04 – Case Management	CM74	Ability to present settlements (and select associated data) on map within a given radius (example: the \$ amounts of recent settlements that set precedent for a neighborhood).	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM75	System provides mechanism for automatically applying appeal/hearing value change information entered in appeal module to the CAMA/Assessment Administration parcel record/personal property account(s) for given year(s).	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01

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Subsection 04 – Case Management	CM90	Provides Case event (hearing, trial, meeting, etc.) tracking module.	6_Moderate	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	CM01
Subsection 04 – Case Management	CM91	Ability to link case event to a parcel(s) or an account(s).	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM92	Provides facility for the scheduling of personnel, rooms, and resources for hearings or settlement meetings.	2_New Code	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	CM01
Subsection 04 – Case Management	CM93	Ability to import an electronic file from State Board containing parcel/account numbers and associated information regarding the scheduling of hearings (automatically notify Managing Appraiser of the import).	2_New Code	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	CM01
Subsection 04 – Case Management	CM94	System provides ability to manually enter changes to the case event schedule details (i.e. appraiser assigned).	8_Minimum	Yes	Vision does not have a case management module. This is an additional cost on top of the base case management requirements.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	CM01
Subsection 04 – Case Management	CM95	Ability to generate meeting notices.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 04 – Case Management	CM96	Proposed case event scheduling solution integrates with Microsoft Exchange.	10_Available	Yes	This requirement is included in the base case management functionality.	Vision CAMA /AA	GAP	\$ -	Yes	CM01
Subsection 02 – Sketches/Photos/CAD Drawings	SPC15	Ability to value all structures with or without a sketch associated to the property.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 05 – Document Management	DM02	Ability to launch an associated electronic file from within the System.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 05 – Document Management	DM03	Ability to copy multiple images (i.e. tif, jpeg, etc.) from one parcel/record/multiple number/lesser number to another.	8_Minimum	Yes	County would like to discuss this further with Vision	Vision CAMA /AA	GAP	\$ -		
Subsection 05 – Document Management	DM04	Ability to view images in conjunction with GIS data.	10_Available	Yes		Vision CAMA /AA	FIT			

Subsection 05 – Document Management	DM05	Ability to search for key words contained within documents.	2_New Code	Yes	Vision does not currently provide support to do full text search inside of documents. This cost would allow us to do that for documents inside Vision or documents in OnBase if and only if OnBase provides API support for such document searches.	Vision CAMA /AA	GAP	\$ 56,000.00		
Subsection 06 – Reporting	RT01	Provides an ad hoc reporting tool which may access any field of data.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT02	Ability to develop custom reports and provision general access via the reports menu.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT03	Ability to save and reuse reports defined by the user.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT04	Ability for user to share saved reports with other users.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT05	Ability to configure report layouts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT06	Ability to create ad hoc reports/queries accessing multiple years of data - past, future, or current.	10_Available	yes	The current system allows reporting of some data (such as final values) across multiple years. Other data is not currently available via the report wizard as it spans multiple databases. This cost would provide the county with a solution that would meet their needs.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 06 – Reporting	RT07	Ability to send queries and reports to printer, fax server, e-mail client, or file in several application formats (Example: HTML, Acrobat, Word, Excel, etc.).	10_Available	yes	The system supports exporting to various formats and printing; however, fax and email are not currently supported.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 06 – Reporting	RT09	Ability to generate print correspondence and save electronic copy linked with the associated account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT10	Ability to generate error and warning reports to identify records with actual or potential valuation or data entry problems.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT11	Ability to generate lists of properties with extreme or inconsistent data based on user defined parameters.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT13	Provides the option of adding a bar code to each report.	8_Minimum	yes	Bar codes are not supported by Vision. This work would add	Vision CAMA/AA	GAP	\$ 3,500.00	Yes	DE21

					bar codes to reports.					
Subsection 06 – Reporting	RT14	Ability to automatically generate letters/notifications using mail merge functions.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT15	Supports printing of mailing labels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT20	Ability to qualify search criteria using common operations (>, <, =) and Boolean operators (AND, OR, NOT).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT21	Ability to search by multiple data elements simultaneously.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT22	Provides history of and access to recent searches.	8_Minimum	yes	Searches by users are not currently stored by the system (though the last search is stored until a new one is created). Vision would add a search history to the application.	Vision CAMA /AA	GAP	\$ 7,000.00	-	-
Subsection 06 – Reporting	RT23	Ability to search using partial search strings and/or wildcards.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT50	Ability to create custom valuation notices without Contractor / programmer assistance.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT51	Ability to generate and print value notifications both in-house or through an outside vendor.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT52	Ability to create value notification letters in batch, by specific property account numbers or other user defined criteria.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT53	Ability to print and mail valuation notices of selected groups of properties or individual property accounts as many times as needed during an assessment year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT54	Ability to qualify parcels via user-specified criteria and automatically code to suppress a valuation notice from printing.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT55	Ability to present any and all applicable valuation relief or special programs on Notice of Valuation.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT70	Ability to store image of the Notice of Value with associated account.	10_Available	yes	Vision needs to expand its current functionality to support attaching an image to all parcels to display the Notice of Value.	Vision CAMA /AA	GAP	\$ 15,400.00		

Subsection 06 – Reporting	RT71	Ability to query and view comparable neighborhoods within the System.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Reporting	RT72	Ability to export parcel/record/multiple number/lesser number data.	10_Available	yes	The GAP for this requirement is to support the lesser number.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 06 – Reporting	RT73	Provides queries and reports to forecast workloads and monitor workload status.	10_Available	yes	This requirement is dependent on workflow. This cost is in addition to the base workflow requirement.	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01
Subsection 06 – Reporting	RT74	Ability to include GIS object(s) in reports.	10_Available	yes	Additional work is required to integrate GIS into Microsoft SSRS.	Vision CAMA/AA & 3rd Party Software	GAP	\$ 7,000.00		
Subsection 06 – Reporting	RT75	Ability to include sketch image(s) in reports.	8_Minimum	yes	Additional work is required to integrate sketch images into reports.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Reporting	RT76	Ability to provide to the website any notices/mailings electronically.	8_Minimum	yes	Vision would add a service call that would allow the web site to retrieve a notice or mailing. Alternatively, an batch export could be written to provide links to the images/documents.	Vision Web Module	GAP	\$ 3,500.00		
Subsection 06 – Reporting	RT90	Ability to graph output from user search criteria into line graphs.	10_Available	yes	Vision supports graphs through MS Excel or MS SSRS. Vision does not current support graphs in the report wizard. This cost would allow graphing capability in the report wizard.	Vision CAMA /AA ands 3rd Party Software	GAP	\$ 14,000.00	Yes	RT90
Subsection 06 – Reporting	RT91	Ability to graph output from user search criteria into bar graphs.	10_Available	yes	Vision supports graphs through MS Excel or MS SSRS. Vision does not current support graphs in the report wizard. This cost would allow graphing capability in the report wizard. The cost for this are included in RT90.	3rd Party Software	GAP	\$	Yes	RT90
Subsection 06 – Reporting	RT92	Ability to graph output from user search criteria into histograms.	10_Available	yes	Vision supports graphs through MS Excel or MS SSRS. Vision does not current support graphs in the report wizard. The cost for this are included in RT90.	Vision CAMA /AA ands 3rd Party Software	GAP	\$	Yes	RT90
Subsection 06 – Reporting	RT93	Ability to graph output from user search criteria into scatter diagrams.	10_Available	yes	Vision supports graphs through MS Excel or MS SSRS. Vision does not current support graphs in the report wizard. This cost would allow graphing capability in the report wizard. The cost for the scatter graph are in the RT90. This requires	Vision CAMA /AA ands 3rd Party Software	GAP	\$ 14,000.00	Yes	RT90

					<del>additional costs to report on the user search criteria.</del>					
Subsection 07 – Notes	NT01	Ability to record notes in a transactional manner, capturing create date/time and associated user.	10_Available	yes	Vision allows the storage of a notes with each field. Maricopa requires additionally functionality for storing the date/time and associated user. Other fields were discussed during the GAP session as well.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 07 – Notes	NT02	Ability to store unlimited number of characters in note fields.	10_Available	yes	Limited of 2000 per note but can store unlimited number of notes	Vision CAMA /AA	FIT			
Subsection 07 – Notes	NT03	Ability to categorize notes by type.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Notes	NT04	Ability to manage note edit capability according to security role.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Notes	NT05	Provides a consolidated notes view that presents all notes related to a parcel/record/ multiple number/lesser number in one area regardless of their data entry origin.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Notes	NT06	Provides spell-checking function for memo and comment fields.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Multi Year Capability	MY0 1	Provides access to multiple years of characteristic and valuation data.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Multi Year Capability	MY0 2	Ability to view the characteristics and value of a parcel/record/multiple number/lesser number at any point in time.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Multi Year Capability	MY0 3	Ability to view associated GIS characteristics at any point in time.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP01	Ability to add, edit or delete building permit information in the system.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP02	Ability to recognize assignment status of a permit or group of permits.	10_Available	yes	Additional GAP item for workflow	Vision CAMA /AA	GAP	\$ 1,400.00	Yes	WF01
Subsection 12 – Building Permits	BP03	Ability to filter permits by property type, status and other parameters.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP04	Ability to link or store multiple file attachments with associated permit.	10_Available	yes	Vision stored documents associated with parcel and not with the permit. The GAP is to allow a document to be associated to the parcel and to a permit.	Vision CAMA /AA	GAP	\$ 7,000.00		

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Subsection 12 – Building Permits	BP05	Ability to group permits by multiple methods including workgroup, supervisor, and geographic region.	10_Available	yes	Vision stores permits by parcel. The GAP is to retrieve permits based on data in the parcel.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 12 – Building Permits	BP06	Ability to link a building permit(s) to a parcel(s)/account(s).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP10	Ability to receive building permit information electronically from issuing jurisdictions.	10_Available	yes		3rd Party API	FIT			
Subsection 12 – Building Permits	BP11	Ability to recognize new permits received for a given date.	10_Available	yes	Additional GAP item for workflow	Vision CAMA /AA	GAP	\$ 8,400.00	Yes	WF01
Subsection 12 – Building Permits	BP12	Ability to automatically generate workflow tasks upon import of the permit file.	8_Minimum	yes	Additional GAP item for workflow	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 12 – Building Permits	BP13	Ability to evaluate attributes of new permits to determine existence of corresponding buildings or parcels in the system.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP14	Ability to update completion status of permits based on identification of a corresponding building or parcel in the system.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP15	Ability to identify existing open permits when updates are performed on the associated building or parcel to facilitate follow on activities (cancellations, call backs, etc.)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 – Building Permits	BP16	Ability to update completion status of permits based on creation of associated building or parcel in the system.	10_Available	yes	Additional GAP item for workflow	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 12 – Building Permits	BP17	Supports unlimited active permits on a given parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Mobile Devices/Field Data Collection	MD0 1	Provides a solution for use on a mobile computing device that will facilitate field activities including data collection, data correction, valuation, measuring - sketching, GPS guidance, digital map displays, and workflow management.	10_Available	yes	The major GAP with the tablet is to provide the workflow functionality on the tablet so the experience is similar to the desktop workflow.	Vision CAMA /AA	GAP	\$ 105,000.00	Yes	WF01
Subsection 13 – Mobile Devices/Field Data Collection	MD0 2	Ability to export or download specified property characteristics and digital images to a mobile device (laptop, tablet, smart phone).	10_Available	yes	Apex drawings and integration with mobile tool - how will this work?	Vision CAMA /AA	GAP	\$ -		
Subsection 13 – Mobile Devices/Field Data Collection	MD0 3	Ability to query the parcel data by user-identified criteria to identify parcels to include in field	10_Available	yes		Vision CAMA /AA	FIT			

		inspections.								
Subsection 13 – Mobile Devices/Field Data Collection	MD04	Ability to exchange data (upload and download) with the solution and a mobile device.	10_Available	yes		Vision CAMA /AA/Vision Mobile	FIT			
Subsection 13 – Mobile Devices/Field Data Collection	MD05	Ability to group permits by geographic area.	10_Available	yes	Not working to demo, also needs to be tied to permits	Vision CAMA /AA	GAP	\$ -		
Subsection 13 – Mobile Devices/Field Data Collection	MD06	Ability to select parcel characteristics, digital images, and sketches by any user defined criteria including neighborhood, parcel number, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Mobile Devices/Field Data Collection	MD07	Ability to set compound sorting for query output for print run of field inspections.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Mobile Devices/Field Data Collection	MD08	Ability to query property account data by any user-defined criteria or combination of criteria with output exportable to industry standard programs (e.g. MS Excel, MS Access, SPSS)	2_New Code	yes	SPSS - pass through a model - Out in the field and doing an appraisal - supervisor out overseeing what someone is doing. Run a search based on certain criteria to see what is happening in the field - Admin side of the application - to create this query.	Vision CAMA /AA	GAP	\$ 28,000.00		
Subsection 13 – Mobile Devices/Field Data Collection	MD10	Ability to indicate when property characteristics are estimated.	8_Minimum	yes	Add indication for estimated property characteristics	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 13 – Mobile Devices/Field Data Collection	MD11	Ability to copy inspection data and characteristics from one property account number to another for rapid collection (example: subdivision with "same as" buildings).	8_Minimum	yes	Condo front end piece that allowed you to control what type of property was there - would create this for both CAMA and the tablet	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 13 – Mobile Devices/Field Data Collection	MD12	Ability to generate and print a field "permit package" with option to include parcel history, cost, map, Apex sketch, permit history, maps and photos.	6_Moderate	yes	During the GAP discussion, printing a permit package was not necessary for the tablet. Supporting APEX sketch on the Vision tablet is a GAP.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 13 – Mobile Devices/Field Data Collection	MD13	Ability to create, modify, and share an appraiser field visit itinerary.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Mobile Devices/Field Data Collection	MD20	Ability to prompt parameters (selection criteria, sort order, identifies # of parcels) for a print run; then allows user to cancel or proceed with print run to generate hard copies of field sheets.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 01 – Backup and Recovery	BA01	Provides full backup and recovery functionality.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	BA02	Ability for self-recovery of the system.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	BA03	Ability to copy and restore information for backup and/or archival purposes.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE01	System has a published API.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE03	Ability to export selected data to various PC-related applications including, but not limited to XML, CSV, and MS Excel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE10	Ability to integrate with an electronic message system that supports Internet email standards.	10_Available	yes		Vision CAMA /AA and 3rd Party API	FIT			
<del>Subsection 01 – Backup and Recovery</del>	<del>DE11</del>	<del>Ability to connect with optical character readers.</del>	<del>6_Moderate</del>	<del>yes</del>	<del>Vision does not currently support any optical readers. This cost would add support for an OCR reader.</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 24,500.00</del>	<del>-</del>	<del>-</del>
Subsection 01 – Backup and Recovery	DE12	Allows for integration with 3rd party Microsoft Office products (including MS Word and MS Excel).	10_Available	yes		Vision CAMA /AA	FIT			
<del>Subsection 01 – Backup and Recovery</del>	<del>DE13</del>	<del>Supports TWAIN compliant scanners.</del>	<del>10_Available</del>	<del>yes</del>	<del>Vision 7 does not current support any scanners. Vision will add support for TWAIN compliant scanners.</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 7,000.00</del>	<del>-</del>	<del>-</del>
Subsection 01 – Backup and Recovery	DE14	Ability to accommodate large data transfers to long-term media storage (tape or fiche)	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 01 – Backup and Recovery	DE20	Provides configurable utility for the definition of repeatable data import/export processes.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE21	Provides tools for balancing data received from state for state-assessed utilities with resulting data imported.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE22	Ability to reconcile accounts received from state with those currently existing in active database and identify unmatched accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Backup and Recovery	DE23	Ability to identify and retrieve all records updated from a given data file.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE01	Supports field level security.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE02	Supports function level security.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 02 – Security	SE03	Support security definition by groups and individuals, including public access.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE05	Ability to restrict access to sensitive or confidential information.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE08	Ability to place a session into an inactive state and require credentials to be re-entered after a County-defined inactive period.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE09	Supports for single sign-on authentication.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Security	SE10	Ability to integrate with Microsoft Active Directory.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 02 – Security	SE11	Provides for security access based upon user name and password referencing AD groups.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB01	System database is SQL compliant.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB02	Allows for full database access using ODBC drivers.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB03	Allows for separate database instances for application testing, user training, production, web, and development.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB04	Ability to enforce referential integrity.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB05	Ability to create custom tables, expand and/or delete tables through Contractor-supplied administrative facility.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB10	Provides consistent handling of and recovery from user and programmatic errors across all proposed modules.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB11	Supports data mirroring or equivalent.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB12	Ability to perform load balancing.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Database Standards	DB13	Ability to schedule batch jobs at a user-defined date and time.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU01	Ability to define audited transactions without limitation to the entity audited.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU02	Ability to produce user audit reports including user log-ins, time in system, modules accessed, etc.	10_Available	yes	Most of the data is stored; however specific user statistics about login, time in system etc.	Vision CAMA /AA	GAP	\$ 7,000.00		

					are not currently stored					
Subsection 04 – Audit	AU03	Ability to view history of changes to a record from within the system and without requiring a report.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU04	Ability to capture change reason codes for all database changes.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU10	Provides for the display of audit trail information on individual parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU11	Ability to identify and refine a population (records) from which a representative sample for internal audit can be selected.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU12	Ability to apply standard statistical analysis techniques to the population and/or sample selected for internal audit.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU13	Ability to export in an SPSS consumable format the population or sample defined for internal audit for statistical analysis	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Audit	AU14	Ability to consume/import the results of statistical analysis performed with SPSS upon the population or sample defined for internal audit.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 0 - General	RG01	Ability to store or link to multiple digital photographs with an associated property record.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG02	Ability to capture property characteristics required to develop and maintain cost, market, and income models.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG04	Ability to simultaneously edit multiple years' data, both real property data and personal property data.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG05	Ability to capture data identifying different property classifications such as types (PUC), uses, and occupancies.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG10	Ability to move building characteristics from a parcel/account (including value approaches, photos, sketches, and file attachments) to another parcel/account.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 0 - General	RG11	Ability to select one or more buildings from a multi-building parcel/account and move associated building characteristics (including value approaches, photos, sketches, and file attachments) to another parcel/account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG12	Ability to capture the date, user info, originator (e.g. appraiser), reason for override, assessment year applied, etc. when a system generated-value is overridden.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General	RG13	Ability to copy and/or move selected property characteristics from one property to one or more properties.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA01	Ability to generate Full Cash Value(s).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA02	Ability to generate limited value(s).	10_Available	yes	Vision will add the ability to generate limited value.	Vision CAMA /AA	GAP	\$ 28,000.00		
Subsection 01 – Valuation	VA03	Ability to generate assessed value(s).	10_Available	yes	Vision will add the ability to generate assessed value based on the laws of Arizona and Maricopa county.	Vision CAMA /AA	GAP	\$ 131,250.00		
Subsection 01 – Valuation	VA04	Ability to calculate valuation of an income property or group of properties.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA05	Ability to calculate valuation of a mixed use property or group of properties.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA06	Ability to generate value based on property type.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA07	Ability to generate value based percentage complete following permit inspection.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA08	Ability to value land and structure components of a Commercial property separately regardless of the valuation method	10_Available	yes		Vision CAMA /AA	FIT			
<del>Subsection 01 – Valuation</del>	<del>VA09</del>	<del>Supports use of multiple value approaches either individually or combined to value a property.</del>	<del>10_Available</del>	<del>yes</del>	<del>Currently, Vision allows only 1 selected approach to value. This functionality would allow multiple approaches to value for a parcel.</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 38,500.00</del>	<del>Yes</del>	<del>VA09</del>
Subsection 01 – Valuation	VA10	Ability to recalculate values for current or prior assessment years based on changed characteristics.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 01 – Valuation	VA11	Ability to present all records associated with a parcel (e.g., mobile homes and land parcels, parcels with two homes, contiguously assessed parcels) and calculate the overall value of all records while maintaining and displaying separate values.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA12	Ability to track and add incremental land value attributable to miscellaneous factors, such as well, septic, view, easements, traffic, and noise influences.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA13	Ability to reference the list of all associated records used in the development of an assessed value.	10_Available	yes	Vision is currently developing support for an economic unit. This amount represent additional costs to the current requirements under development.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 01 – Valuation	VA20	Ability to produce market value estimates using comparable sales.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA21	Supports a value reconciliation process within the comparable sales approach and between other valuation approaches to derive final reconciled Full Cash value estimate.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA25	Ability to generate a Notice of Value representing multiple properties for a single Owner - real or personal.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA30	Ability to perform a mass update across a group of records with common characteristics.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA40	Ability to designate a default valuation approach at the record level.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA41	Ability to override the default valuation approach and select an alternative.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA45	Ability to recalculate values for (at a minimum three) prior years based on changed property characteristics.	10_Available	yes	Currently, Vision supports modification in only 1 year at a time. Vision needs to add the ability to allow changes to 3 different.	Vision CAMA /AA	GAP	\$ 28,000.00		
Subsection 01 – Valuation	VA46	Ability to batch update values for groups of parcels selected by the user regardless of point in the assessment year.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 01 – Valuation	VA47	Ability to capture improvement ratio distinctly from land ratio.	6_Moderate	yes	Add the ability to calculate the improvement ratio	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 01 – Valuation	VA50	Ability to develop land valuation models using all tracked land characteristic fields.	10_Available	yes	Vision can develop land valuation models based on specific data valuation fields. This cost accounts for the word all in the requirement.	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	MR03
Subsection 01 – Valuation	VA51	Ability to establish baseline value components for a given model (such subdivision, economic unit, geographical area, etc.)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA60	Ability to apply multiple adjustments for the physical, functional, and economic obsolescence.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA61	Ability to apply multiple adjustments for location and market influence adjustments for factors that affect property values.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA62	Ability to designate an explanation code for each adjustment.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA63	Ability to indicate a sunset date for each adjustment.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA64	Ability to code individual properties with a flag or marker that suppresses the application of the annual adjustment.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA65	Ability to capture and query all percent adjustment changes by assessment year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA66	Ability to identify different value components (e.g. market value, assessed value, land use value) and annually adjust each component separately.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA67	Ability to apply adjustments to groups of parcels based on user defined criteria.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA68	Ability to add a positive or negative lump sum dollar adjustment to adjust the building value and subsequently identify records on which the adjustment was made.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA69	Ability to capture a comment/reason code (etc.) describing the application of a lump sum dollar adjustment.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 01 – Valuation	VA70	Provides a separate indication of percent complete for each building or structure on a parcel that adjusts the building or structure value relative to the building or structure's overall percent complete.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA71	Ability to perform percentage adjustments to land values on an individual parcel basis to reflect influences that may not be typical in the neighborhood (development issues, access).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA72	Ability to perform percentage adjustments to base land value to reflect influences that may not be typical in the neighborhood (development issues, access)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA73	Ability to categorize land by topography (low, flat, steep, wet etc.) and apply an adjustment factor specific to each topography.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA74	Ability to identify a portion of a parcel (land or building) which is subject to an administrative requirement (e.g. tax district, exemptions, etc.) and exclude the remainder.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA80	Ability to identify and value contiguous land with the same owner and subsequently value as a single consolidated parcel.	10_Available	yes	This requirement requires the expansion of Vision's associated parcel functionality.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 01 – Valuation	VA81	Ability to apply different depreciation amounts to different buildings on the same property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA90	Supports cost approach calculations for residential valuation.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA91	Ability to calculate commercial cost valuation on a property or group of properties (Marshall and Swift derived).	10_Available	yes	Part of the Marshall and Swift integration. No additional cost.	Vision CAMA/AA & 3rd Party Software	GAP	\$ -	Yes	MR40
Subsection 01 – Valuation	VA92	Ability to display and print, line by line, a build-up of the cost approach.	10_Available	yes	Vision does not support Marshall and Swift Segregated. The cost for this item is in the general Marshall & Swift line item.	Vision CAMA /AA	GAP	\$ -	Yes	MR40
Subsection 01 – Valuation	VA93	Ability to present the detail of values per building component produced by the cost approach on a	10_Available	yes	Vision does not support Marshall and Swift Segregated. The cost for this item is in the	Vision CAMA /AA	GAP	\$ -	Yes	MR40

		year-by- year basis.			general Marshall & Swift line item.					
Subsection 01 – Valuation	VA95	Ability to allow restrict updates to valuation related tables to only authorized users.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA96	Ability to extract sold properties from the master sales file and build a sales history file on the subject property for sales analysis purposes.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Valuation	VA97	Ability to present the details of assessed values produced by the sales comparison approach on a year-by-year basis.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG01	Ability to value property as agricultural land.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG02	Ability to maintain separate field for agricultural status.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG03	Ability to maintain separate field for agricultural district.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG04	Ability to maintain agricultural land lease information.	10_Available	yes	Vision needs to add support for land lease information in the alt land module.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Agricultural Land	AG05	Ability to value improvements situated on agricultural land.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG06	Ability to configure required recalculation of value when a change in use occurs.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG10	Ability to track the application process for agricultural use classification including the date application is received and the status.	10_Available	yes	Vision needs to add support for the application dates and status.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Agricultural Land	AG11	Ability to update multiple parcels with indication they are applying for agricultural classification.	10_Available	yes	Vision needs the ability to update multiple parcels when processing the application for agricultural classification.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Agricultural Land	AG12	Ability to link the agricultural land application to the parcel.	10_Available	yes	Doc	Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG13	Ability to enter and track agricultural land applications and their related fields of data.	10_Available	yes	Interface (State Website carries form but Interface with Maricopa)	Vision CAMA /AA	FIT			
Subsection 02 – Agricultural Land	AG14	Provides configurable flag for agricultural-designated properties based on unique circumstances defined by the business.	10_Available	yes	meets per client demo	Vision CAMA /AA	FIT			

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Subsection 03 – Special Properties	SP01	Ability to value special properties.	10_Available	yes	Adjustment fields to vacant land parcels	Vision CAMA /AA	GAP	\$ 56,000.00		
Subsection 03 – Special Properties	SP02	Ability to distinguish special properties based on the property use code and value them according to Statutory valuation rules (Statutory Shopping Centers, Golf Courses, etc.).	10_Available	yes	Vision needs to add support for Shopping Centers Golf courses and other special properties. These items are required for support Arizona law.	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	SP02
Subsection 03 – Special Properties	SP03	Ability to maintain an individual field for property use code.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Special Properties	SP04	Ability to import valuation tables for special property valuation.	10_Available	yes	Additional requirements for item SP02	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	SP02
Subsection 03 – Special Properties	SP10	Ability to calculate potential golf course penalties.	8_Minimum	yes	Additional gap for golf courses. If a golf course ceases operations a "roll back" is applied. Need to be able to carry market value for 10 years. And value is also stat. Applied on Imp/Land as well.	Vision CAMA /AA	GAP	\$ 56,000.00	Yes	SP02
Subsection 04 – Creating Residential Subdivision Model Homes	RS01	Ability to create a base set of model homes, including sketches, for each new subdivision (thus creating a link between model home and subdivision).	10_Available	yes	Vision needs to add the ability create sub-divisions and several attributes such as sketches.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 04 – Creating Residential Subdivision Model Homes	RS02	Ability to select and apply model homes to vacant land parcels within a subdivision with sketches associated with base set.	10_Available	yes		Vision CAMA /AA	GAP	\$ 7,000.00	Yes	RS02
Subsection 04 – Creating Residential Subdivision Model Homes	RS03	Ability to perform and/or restrict updates to components on a parcel when a model has been applied.	10_Available	yes	Gap ? IRIM and Real Data yes but PDF.	Vision CAMA /AA	FIT			
Subsection 04 – Creating Residential Subdivision Model Homes	RS04	Ability to designate a model as draft and restrict its use until finalized.	10_Available	yes		Vision CAMA /AA	GAP	\$ 15,400.00	Yes	RS02
Subsection 04 – Creating Residential Subdivision Model Homes	RS05	Ability to link the model drawing to a parcel when the model is assigned to the parcel.	10_Available	yes		Vision CAMA /AA	GAP	\$ 4,900.00	Yes	RS02
Subsection 04 – Creating Residential Subdivision Model Homes	RS06	Provides a facility to capture and administer a collection of builder records associated with the models.	10_Available	yes		Vision CAMA /AA	GAP	\$ 7,000.00	Yes	RS02
Subsection 04 – Creating Residential Subdivision Model Homes	RS07	Ability to assign a property to an MCR (Maricopa County Recorder) ID	10_Available	yes	yes, this is a subdivision number	Vision CAMA /AA	FIT			

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Subsection 04 – Creating Residential Subdivision Model Homes	RS08	Ability to designate a subdivision as Residential, Commercial, or both and to limit association to appropriate property types.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Creating Residential Subdivision Model Homes	RS09	Ability to trigger the creation of a call back when a property is associated with an MCR ID.	8_Minimum	yes	Yes- this is a later decision of where to put it based on valuation and use of this number	Vision CAMA/AA	FIT			
Subsection 04 – Creating Residential Subdivision Model Homes	RS10	Ability to add situs addresses to parcels in a subdivision.	10_Available	yes	This is interface and hand entered	Vision CAMA /AA	FIT			
Subsection 05 – Correspondence	CO01	Ability to create rejection letters.	10_Available	yes	Couple 100 a week	Vision CAMA /AA	FIT			
Subsection 05 – Correspondence	CO02	Ability to store date information related to the creation of rejection letters.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP01	Ability to build a total assessed value from multiple segments of a property using a different method for each segment.	8_Minimum	yes	Vision currently supports only one value source per parcel. Vision will add the ability to pick a value source based on the building.	Vision CAMA /AA	GAP	\$ 10,500.00	Yes	VA09
Subsection 06 – Commercial	CP02	Ability to designate a specific property type code for each floor and/or building section.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP03	Ability to update valuation components by applying a multiplicative factor to the following: rent tables, vacancy tables, expense tables and cap rate tables.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP04	Ability to value income-producing property using the direct capitalization, gross rent multiplier, straight-line building residual method, or gross income multiplier method.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP05	Ability to capture gross rent, vacancy and collection loss, miscellaneous income, and itemized expenses, for all property types.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP06	Ability to calculate median and mean rent per unit of measure, expense ratios, market rents, vacancy levels, gross income multipliers, and overall capitalization rates for any strata of commercial property.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 06 – Commercial	CP07	Ability to calculate and display common value denominators (units of comparison) such as, Value per Unit, Value per Room, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP08	Ability to request a calculated average of any table factor (dollar/square foot, average rental price/unit, etc.) by various parameters.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP11	Ability to deduct personal property value in all approaches to value.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP20	Supports a line-item listing of a parcel's operating expenses in the income approach record.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP21	Ability to display a build-up of the income approach including land values from other parcels, personal property deductions, market indexes, and adjustment factors used.	8_Minimum	yes	Vision needs to add the link to personal property to pull the deductions.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Commercial	CP25	Ability to store multiple income types for each income segment.	10_Available	yes		Vision CAMA/AA	FIT			
Subsection 06 – Commercial	CP26	Ability to enter, track, and employ multiple income streams on each parcel in the development of a value using the income approach.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP27	Ability to incorporate or exclude personal property value in income approach.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP28	<del>Ability to reference research to create internal tables for use in the income approach.</del>	<del>8_Minimum</del>	<del>yes</del>	<del>Vision needs to add the ability to interface with third party income data such as Costar.</del>	<del>Vision CAMA/AA</del>	<del>GAP</del>	<del>\$ 14,000.00</del>	<del>-</del>	
Subsection 06 – Commercial	CP29	Ability to view detail of values produced by the income approach on a year-by-year basis.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP30	Ability to incorporate land value from other parcels within a subject property's income stream.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP31	Ability to populate income approach fields using either Application-generated factor or manually input factors.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP40	Ability to value multi-family properties (e.g.: duplex, triplex+>, apartment complexes) using a Gross Rent Multiplier.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP41	Ability to value multi-family properties (e.g.: duplex, triplex+>, apartment complexes) using a	10_Available	yes		Vision CAMA /AA	FIT			

		Gross Income Multiplier.								
Subsection 06 – Commercial	CP42	Ability to apply a line item adjustment for personal property on a multi-family property.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP43	Ability to associate multiple Gross Rent Multipliers or Gross Income Multipliers with one parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP70	Supports scheduling and management of callbacks (revisits to a selected property).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP80	Ability to suppress viewing, accessing, downloading and/or exporting confidential income and expense data by unauthorized users.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP81	Provides client-configurable validations and audit capabilities for changes to cost	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP90	Ability to develop, save, and apply income and expense models to parcels based on user defined selection criteria (E.g. Neighborhood, Property Type, etc.).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Commercial	CP91	Ability to develop models comprised of typical income, expense, and capitalization rate figures that can be applied to subject properties within the same strata.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC01	Ability to designate multiple building styles.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC02	Ability to designate multiple base building quality classes for each property type.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC03	Ability to indicate multiple building condition descriptions (E.g. Fair, Good, Average etc)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC04	Ability to accommodate different units of measure for land value, including, square foot, front foot, acre, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC05	Ability to capture multiple units of measure associated with an individual parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC06	Ability to code each line item of land as either improved or	10_Available	yes		Vision CAMA /AA	FIT			

		unimproved.								
Subsection 07 - Data Characteristics	DC07	Ability to store actual dimensions of a parcel (e.g., 50' x 100').	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC08	Ability to represent multiple (3 or greater) above ground stories on a single-family residential structure.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC09	Ability to enter data independently for each floor of a building.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC10	Ability to designate sub-category identifiers, such as corner, pad site, prime land, traffic count, contaminated, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC11	Ability to link sub-category identifiers with value table, coefficient, or percentage adjustment.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC20	Ability to transfer records between property types, such as residential and commercial, for change of use, valuation and/or characteristics.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC30	Ability to tag property characteristics with identifiers as to the source of the information, such as Maricopa County user, taxpayer, fee appraiser, realtor, home inspector etc.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 07 - Data Characteristics	DC31	Ability to separate the land component of a single parcel into specific land categories (home site, low, wet, rolling, flat etc.) by standard units of measurement (Sq. Ft., acres, lineal feet) each with its own value component.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT01	Ability to create, store, modify, access and apply separate sets of cost data from multiple sources for each property type.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT02	Ability to designate a local cost modifier for each geographic area (Cycle, Neighborhood, City etc....) and for each property type.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT03	Ability to represent values by one or more measurement methods (square foot, linear foot, lump sum) by size, class, quality, and style.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT04	Ability to represent values considering attributes for size, class, quality, and style.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 08 - Appraisal Tables	AT05	Supports unlimited versions of all tables in the same assessment year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT10	Ability to employ a current cost modifier for each building quality class.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT11	Provides cost rate and depreciation tables for single-wide, double-wide and triple-wide mobile homes.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT20	Ability to override automatic recalculation and apply updates at specified time.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT21	Supports batch import and export of data (using industry standard software such as .xls, <del>mdb or dbf</del> files) into or out of the system for all appraisal table data.	10_Available	yes	Vision currently supports exports to text files with a variety of delimiters through the export tool. The report writer supports xls, TIFF, PDF and HTML. <del>Support for a direct integration to a mdb or dbf is a GAP. It is not scoped to support the mdb or dbf as might be achieved in a different manner.</del>	Vision CAMA /AA	GAP	\$ -		
Subsection 08 - Appraisal Tables	AT50	Ability to store a historical copy of all land value tables by assessment year in both a read-only format an active/live format (for correcting prior values, splits, etc.)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT51	Ability to store a historical copy of all cost tables by assessment year in both a read-only format an active/live format (for correcting prior values)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT60	Ability to define and enforce an approval workflow for authorization of changes to any value-related table.	10_Available	yes	Additional functionality for workflow related to change in value.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 08 - Appraisal Tables	AT61	Ability to automatically recalculate all associated property records following authorization to table changes.	10_Available	yes	Additional functionality for workflow related to change in value.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 08 - Appraisal Tables	AT80	Ability to print all or a selected portion of a table.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT81	Ability to view all tables on-line (on screen) or in printed form (e.g., land rate tables, land add on tables, cost tables, etc.).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT90	<del>Ability to apply costs in any combination of the following:</del>	<del>10_Available</del>	<del>yes</del>	<del>Header row</del>	<del>Vision CAMA /AA</del>	<del>NA</del>			

Subsection 08 - Appraisal Tables	AT91	Ability to apply costs universally across all parcels in assessment jurisdiction	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT92	Ability to apply costs by specified property types	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT93	Ability to apply costs by specified Neighborhoods	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT94	Ability to apply costs by specified Cycles	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT95	Ability to apply costs by plat map	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT96	Ability to apply costs by individual property account number	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 - Appraisal Tables	AT97	Ability to apply costs by Occupancy	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General Personal Property	PP01	Ability to define a relationship between personal property and the associated real property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General Personal Property	PP02	Ability to flag accounts where the associated real property parcel has been deactivated or changed.	10_Available	yes	Currently, personal property and real property accounts are not linked. This requirement to set a flag when the related account is inactive is a GAP. It is possible this requirement has a workflow dependency.	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01,PP02
Subsection 0 - General Personal Property	PP03	Ability to identify personal property accounts without a defined association to a real property parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 0 - General Personal Property	PP04	Ability to track the status of an account (e.g., Notice sent? Form returned by owner? Returned timely? Account valued? Valuation notice sent?)	10_Available	yes	Additional functionality for workflow related to the status of an parcel	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01
Subsection 0 - General Personal Property	PP05	Ability to automatically update the personal property account and the real property account when the situs address is changed.	10_Available	yes	Additional functionality for workflow to update the related account in personal property when the situs is updated in real property	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01,PP02
Subsection 0 - General Personal Property	PP06	Ability to change both the mailing address and the situs with a single entry.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 0 - General Personal Property	PP07	Ability to record address changes, both mailing and situs, to a history file.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 0 - General Personal Property	PP08	Ability to cross check the tax code area assigned to a personal property account if the account is linked to a real property account number.	8_Minimum	yes	Add business rule to check the tax code of the real property account when modifying or editing the personal property account.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	PP02
Subsection 0 - General Personal Property	PP20	Ability to record the appraiser number on all associated accounts on multiple when one account has been updated.	10_Available	yes	Additional functionality for workflow related to personal property	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 0 - General Personal Property	PP30	Ability to distribute residual value of an exemption across associated accounts in a multiple.	4_Significant	yes	Ability to add the flat exemption is support. Vision needs to add support to distribute the exemption across multiple accounts	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 0 - General Personal Property	PP31	Ability to distribute residual value of an exemption from a multiple to a related account outside of the multiple.	4_Significant	yes	Vision needs to add support to distribute the exemption across multiple accounts	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 0 - General Personal Property	PP40	Ability to link scanned documents or data files to a personal property account.	10_Available	yes		Vision CAMA /AA	FIT			
<del>Subsection 01 – Mobile Homes</del>	<del>MM0 1</del>	<del>Ability to process both secured and unsecured mobile homes (and related property).</del>	<del>8_Minimum</del>	<del>yes</del>	<del>-</del>	<del>Vision CAMA /AA</del>	<del>FIT</del>			
Subsection 01 – Mobile Homes	MM0 2	Ability to transfer a mobile home from an unsecured to a secured status.	8_Minimum	yes	This function requires the transfer of a personal property account to a real property account. This is a GAP for Vision today. The application shall allow such a transfer. There is a workflow component to this requirement.	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01
Subsection 01 – Mobile Homes	MM0 3	Ability to remove a mobile home from the secured roll and add it to the unsecured roll.	6_Moderate	yes	This function requires the transfer of a real property account to a personal property account. This is a GAP for Vision today. The application shall allow such a transfer. There is a workflow component to this requirement.	Vision CAMA/AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 01 – Mobile Homes	MM0 4	Ability to attach the moving permit.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Mobile Homes	MM0 5	Ability to update the name, mailing address and location associated with the mobile home.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Mobile Homes	MM0 6	Ability to store multiple attributes on mobile homes such as make and model, length and width, serial number as shown on the vehicle	10_Available	yes		Vision CAMA /AA	FIT			

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		title registration, etc.								
Subsection 01 – Mobile Homes	MM09	Ability to recognize status of a mobile home in terms of affixture (whether or not it should be treated as a structure on real property or as personal property).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Mobile Homes	MM10	Ability to process the Affidavit of Affixture.	8_Minimum	yes	Additional functionality for workflow related to personal property. The affidavit is transferred from the recorders office to the personal property team.	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	WF01
Subsection 01 – Mobile Homes	MM11	Ability to link an Affidavit of Affixture to a parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Mobile Homes	MM12	Ability to attach a scanned copy of the Affidavit of Affixture to a parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Mobile Homes	MM13	Ability to store a link to the Recorder’s Office to view the Affidavit of Affixture.	10_Available	yes		Vision CAMA /AA & API	FIT			
Subsection 01 – Mobile Homes	MM14	Ability to record in a dedicated field that an Affidavit of Affixture has been verified or rejected (maintain a separate field to capture rejection reason code).	8_Minimum	yes	Vision needs to add some additional fields to track the verified or rejected status of the affidavit as well as the reason code for the rejection.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 01 – Mobile Homes	MM15	Ability to automatically generate a letter of rejection (based on rejection code) to notify the home owner or title company of the status associated with the Affidavit of Affixture.	10_Available	yes	Additional functionality for workflow related to personal property	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Mobile Homes	MM16	Ability to recognize inspection status of mobile home when Affidavit of Affixture has been issued for a mobile home.	8_Minimum	yes	Additional functionality for workflow related to personal property	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Mobile Homes	MM20	Ability to define and enforce data editing rules to ensure that the owner of record matches the owner name on the parcel.	8_Minimum	yes		Vision CAMA /AA	FIT			

Subsection 02 – Unsecured Mobile Homes	MM5 0	Ability to track sources of incoming information associated with an unsecured mobile home (MVD, Park Reports, Dealer Reports, etc.). Interfaces necessary?	8_Minimum	yes	Add the ability to store additional information for unsecured mobile homes such as: MVD, Park Reports, Dealer Sales Reports, In person Ad hoc, process changes based on changes. Vision would add a supplemental data for unsecured mobile homes that would allow the capture of this information. If an interface is used in the future then the cost might increase depending on the interface.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 02 – Unsecured Mobile Homes	MM5 1	Ability to create and assign a roll number for unsecured mobile homes.	8_Minimum	yes	Vision will extend is support for auto generated numbers to include the roll number for unsecured mobile homes.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Unsecured Mobile Homes	MM5 2	Ability to auto-populate tax district field based on situs address if desired during data entry.	8_Minimum	yes	Vision does not currently store the tax district for a situs address so this functionality would need to get added.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Unsecured Mobile Homes	MM5 3	Ability to calculate the unsecured value for the current year or next year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Unsecured Mobile Homes	MM5 4	Ability to change name, address, and associated information on existing unsecured mobile home accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Unsecured Mobile Homes	MM5 5	Ability to auto-populate associated fields based on a predetermined logic (i.e. year, make, etc) upon entry to VIN number.	8_Minimum	yes	Vision would add the ability to process the VIN number and determine the appropriate characteristics.	Vision CAMA /AA	GAP	\$ 14,000.00	-	-
Subsection 03 – Valuation	PV10	Ability to value mobile homes based on the Cost Approach using Department of Revenue Guidelines (Marshall and Swift based).	10_Available	yes	Vision would setup a cost model based on the Department of Revenue Guidelines.	Vision CAMA /AA	GAP	\$ 21,000.00		
Subsection 03 – Valuation	PV11	Ability to apply the manufacturer’s list price (value listed on the Affidavit of Affixture or Title).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV12	Ability to enter, store, and value all extra features associated with a mobile home (based on Department of Revenue tables/guidelines).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV20	Ability to add an estimated value to an account due to non-reporting or under-reporting by the property owner.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 03 – Valuation	PV21	Ability to indicate a value is an estimate in the line item detail description of an account.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV22	Ability to identify all accounts that contain an estimated value in an asset detail line.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV23	Ability to indicate a personal property account was established through the canvass/discovery process.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV25	Ability to calculate the Full Cash Value/Assessed Value on an account at the time of saving the record.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV26	Ability to re-calculate all accounts at the time of roll production.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV27	Ability to perform copy/roll of prior year's account information either in batch (based on user defined criteria) or on an individual account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV30	Ability to generate value notifications either one account at a time or for a batch of accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV31	Ability to schedule notifications for generation at a future date/time.	8_Minimum	yes	Vision would expand the application to allow the scheduling of notifications for generation at a future date.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 03 – Valuation	PV32	Ability to capture date/time that valuation notice was generated.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV40	Ability to add an unlimited number of asset detail lines for Ag Accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV41	Ability to add an unlimited number of asset detail lines for Commercial Accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Valuation	PV50	Ability to restrict account inactivation and reactivation for assessment purposes only (regardless of whether or not taxes or special assessment fees are still owed on the property).	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 04 – GIS Integration	PG01	Ability to view Personal Property Division information in GIS.	6_Moderate	yes	Vision would integrated personal property information so that it can be integrated into GIS.	Vision CAMA /AA	GAP	\$ 28,000.00		
Subsection 05 – IPR (Improvements on Possessory Rights)	PI01	Ability to value IPR properties using the construction cost system.	6_Moderate	yes	Extend the support of centrally assessed properties to support a construction based cost system.	Vision CAMA /AA	GAP	\$ 7,000.00		

Subsection 06 – Business Forms	BF01	Supports electronic filing of renditions (520s).	4_Significant	yes	Add support for electronic submission of renditions (one at a time)	Vision CAMA /AA	GAP	\$ 56,000.00		
Subsection 06 – Business Forms	BF02	Ability to import electronic submissions (e-filing documents received in Excel format).	2_New Code	yes	Add support for electronic submission of renditions in bulk	Vision CAMA /AA	GAP	\$ 56,000.00		
Subsection 06 – Business Forms	BF03	Ability to electronically compare currently reported data with previous year data.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – Business Forms	BF04	Ability to store and view account detail changes (summary asset list) by schedule, year, and code.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Taxes/Penalties	TP01	Ability to calculate and apply a penalty to late accounts based on the received date of the business form (10% late filing penalty).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Taxes/Penalties	TP02	Ability to associate reason codes with penalty calculations.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Taxes/Penalties	TP03	<del>Ability to calculate interest and penalty values based on the flags.</del>	<del>6_Moderate</del>	<del>yes</del>	<del>Add the ability to add interest and penalty values based on flags</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 7,000.00</del>	-	-
Subsection 07 – Taxes/Penalties	TP04	<del>Ability to calculate the values that result from the audit, including the tax and penalty (both before and after the audit).</del>	<del>8_Minimum</del>	<del>yes</del>	<del>-</del>	<del>Vision CAMA /AA</del>	<del>FIT</del>	<del>-</del>	-	-
Subsection 07 – Taxes/Penalties	TP05	Ability to track additional penalty increases to the general fund and other taxing jurisdictions.	6_Moderate	yes	Add the ability to break out Tax, Interest and Account Info. This may require an interface with the Treasurer (which is not included in the cost as it is undefined).	Vision CAMA /AA	GAP	\$ 7,000.00	-	-
Subsection 08 – Leasing/Multiple	LM01	Ability to cross-reference lesser and lessee for items assessed as leased equipment.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Leasing/Multiple	LM02	Ability to track and appraise leasehold improvements as either personal property or real property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Leasing/Multiple	LM03	Ability to create a master account and lease sub-accounts for each leasing company.	6_Moderate	yes	Add the ability to create a master account and a sub account accounts for a leasing company	Vision CAMA /AA	GAP	\$ 9,625.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM04	Ability to link lesser ID with multiple accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Leasing/Multiple	LM05	Ability to indicate lesser type (Business Personal Property vs. Mobile Home).	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 08 – Leasing/Multiple	LM06	Ability to link parties (individuals, businesses, etc.) to the lesser ID number/multiple number.	8_Minimum	yes	Add the ability to link the lesser id to additional parties associated to the parcel or personal property	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM07	Ability to link addresses to the lesser ID number/multiple number.	6_Moderate	yes	Add the ability to link a address to a lesser id	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM08	Ability to link individual leasing accounts to the lesser ID number/multiple number.	8_Minimum	yes	Add the ability to link leasing accounts together	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM09	Provides individual field for lease account type (i.e. commercial, agricultural, mobile homes, etc).	8_Minimum	yes	Add a lease account type on the lesser record	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM10	Ability to link all returns to a lesser ID number (many to one relationship) /multiple number.	8_Minimum	yes	Add the ability to link returns to a lesser id	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	LM03
Subsection 08 – Leasing/Multiple	LM20	Ability to assign a unique account number for each lease account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Leasing/Multiple	LM21	Ability to store and view complete account details including asset(s), historic acquisition cost(s), etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Leasing/Multiple	LM22	Ability to present summary information pertaining to multiple numbers/lesser numbers.	8_Minimum	yes	Add summary screen based on lesser numbers	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	LM03
Subsection 09 – Personal Property Audit	PA01	Ability to designate an account to be audited in the future.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA02	Ability to classify businesses based on associated NAICS code.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA03	Ability to maintain an audit flag on parcel/account.	10_Available	yes	Add a audit flag for the parcel or account and integrate the audit flag into workflow	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 09 – Personal Property Audit	PA04	Ability to maintain a history of audits associated with the personal property account/multiple number/lesser number.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA05	Ability to associate an audit with a tax year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA06	Ability to indicate the number of years associated with an audit.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA07	Ability to automatically or interactively select accounts to be audited.	10_Available	yes	Add functionality to set the audit flag automatically or through a user interface such as Mass update	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01, PA07

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Subsection 09 – Personal Property Audit	PA08	Ability to select accounts randomly from within client-defined parameters for audit (i.e. X number of new accounts, X number of those with a value over X, X number of those that dropped by more than 50% cash value, etc.)	6_Moderate	yes	Add the ability to randomly selected parcel for audit based on a criteria	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01, PA07
Subsection 09 – Personal Property Audit	PA09	Ability to associate reason code with an audit.	8_Minimum	yes	Add the ability to put in a reason code for an audit	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01, PA07
Subsection 09 – Personal Property Audit	PA10	Ability to maintain audit reason notes.	10_Available	yes	Add the ability to put in reason notes	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01, PA07
Subsection 09 – Personal Property Audit	PA11	Ability to identify the status of the audit.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA12	Ability to record result of the audit in terms of account being in or out of compliance.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA13	Ability to associate multiple/alternative names/addresses/contact information for mailing with audits (by category).	8_Minimum	yes	Vision currently supports multiple names associated with each sale record. This functionality needs to be extend to store the information at a parcel level.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 09 – Personal Property Audit	PA14	Ability to file a claim upon completion of the audit.	8_Minimum	yes	Add the ability to file a claim upon the completion of audit as one of the workflow steps or independent of the workflow	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01, PA07
Subsection 09 – Personal Property Audit	PA15	Ability to store the associated claim information against the personal property account (such as beginning claim Full Cash Value, the ending claim Full Cash Value, etc.) as well as the associated tax values.	8_Minimum	yes	Add the ability to file a claim upon the completion of audit as one of the workflow steps or independent of the workflow	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01, PA07
Subsection 09 – Personal Property Audit	PA16	Ability to track Full Cash Value adjustments resulting from to audits.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 09 – Personal Property Audit	PA17	Ability to track units completed and audit results annually including totals by division, auditor, and taxpayer.	6_Moderate	yes	Create a custom report to track audit results	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 09 – Personal Property Audit	PA20	Ability to record the date upon which the pre-audit questionnaire was mailed.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 09 – Personal Property Audit	PA21	Ability to configure automatic creation of notices if the requested information has not been returned after X days (user defined criteria – i.e. after 10 days, the second letter is mailed if no return information has been entered in the system).	8_Minimum	yes	Add escalation rules to workflow to allow the creation of a notice if information was not returned in a configurable number of days.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01, PA07
Subsection 11 – “What If” Scenarios	WI01	Ability to conduct “what if” analysis on Personal Property Division accounts.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 11 – “What If” Scenarios	WI02	Ability to apply scenario results to accounts.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 11 – “What If” Scenarios	WI03	Ability to save “what if” scenario until approval is granted.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 11 – “What If” Scenarios	WI04	Ability to link a saved scenario to a workflow task.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 12 – Comparables	PC01	Ability to generate comparable accounts using integration of NAICS (North American Industry Classification System).	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 12 – Comparables	PC02	Ability to perform comparisons on similar businesses in order to analyze amounts reported and variances.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 12 – Comparables	PC03	Provides a NAICS Code valuation table with all valid NAICS codes, associated value for each, and an indication of summarized value category for personal property.	0_Can't Provide	no	-	N/A	NA	-	-	
Subsection 12 – Comparables	PC04	Ability to associate NAICS codes with personal property accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Depreciation	PD01	Ability to update depreciation tables manually.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Depreciation	PD02	Ability to copy prior year's depreciation table to the new year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 13 – Depreciation	PD03	Ability to update depreciation tables with information received via data file from State.	10_Available	yes	Create an interface that would allow the depreciation tables to be updated from a data file the state	Vision CAMA /AA	GAP	\$ 9,800.00		
Subsection 13 – Exemptions	PE01	Ability to process exemptions associated with the Personal Property Division accounts.	10_Available	yes	Add exemption calculations based on the Maricopa exemptions to personal property	Vision CAMA /AA	GAP	\$ 11,200.00		
Subsection 14 – Correspondence Tracking	PL01	Ability to store information regarding Notice of Proposed Correction (NOPC) mailing date, taxpayer receipt date, and date the form was returned.	10_Available	yes	Need to store additional information regarding the NOPC and add to the workflow process	Vision CAMA /AA	GAP	\$ 11,200.00	Yes	WF01

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Subsection 14 – Correspondence Tracking	PL02	Ability to implement a 30-day trigger for consent on the NOPC (If the taxpayer does not respond within 30 days after the receipt date, it is an implied consent on the NOPC).	6_Moderate	no	Requires escalation rules in workflow similar to PA21. The costs are located in PA21.	Vision CAMA /AA	GAP	\$ -	Yes	WF01, PA21
Subsection 14 – Correspondence Tracking	PL03	Ability to track NOPC taxpayer response choice (3 choices – codes associated).	10_Available	yes	Need to store additional information regarding the NOPC and add to the workflow process	Vision CAMA /AA	GAP	\$ 8,400.00	Yes	WF01
Subsection 14 – Correspondence Tracking	PL04	Ability to store date associated with SBOE letter.	10_Available	yes	Need to store additional information regarding the SBOE letter and add to the workflow process	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 15 – Resolutions	PR01	Ability to store a unique resolution number associated with each parcel/account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 15 – Resolutions	PR02	Ability to update the detail as well as the Full Cash Value (both secured and unsecured) during the resolution process.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 15 – Resolutions	PR04	Ability to group resolutions into sets called phases.	8_Minimum	no	Create an interface with Treasurer to run once a week in batch and trigger items into workflow	Vision CAMA /AA	GAP	\$ 5,250.00	Yes	WF01
Subsection 15 – Resolutions	PR05	Ability to assign a unique phase number to a group of accounts/parcels.	10_Available	no	Create an interface with Treasurer to run once a week in batch and trigger items into workflow	Vision CAMA /AA	GAP	\$	Yes	WF01
Subsection 15 – Resolutions	PR06	Ability to export phases to the Tax Office.	8_Minimum	no	Create an interface with Treasurer to run once a week in batch and trigger items into workflow	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 15 – Resolutions	PR07	Ability to record the basis code for the resolution.	10_Available	yes	Create an interface with Treasurer to run once a week in batch and trigger items into workflow	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 01 – Stratification	CS01	Ability to maintain individual field for neighborhood number.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS02	Ability to maintain individual field for market area.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS03	Ability for a parcel to belong to multiple neighborhoods (e.g. mixed use, commercial AND residential).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS04	Ability for a parcel to belong to multiple market areas (e.g. mixed use, commercial AND residential).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS05	Ability to maintain history of neighborhood/market area changes.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 01 – Stratification	CS06	Ability to create groupings of properties (neighborhoods) using user-defined parameters, such as: property account number, geocode ranges, property type codes, building class, building style, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS07	Provides fields for the identification of appraisal areas, neighborhoods, and sub-neighborhoods.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Stratification	CS10	Ability to integrate with GIS for neighborhood/market area creation, viewing, and maintenance.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Subdivision Information	SU01	Ability to maintain subdivision summary information.	10_Available	yes	We have a subdivision summary section but not sufficient. Expand to create subdivision editor that stands alone.	Vision CAMA /AA	GAP	\$ 10,500.00	Yes	SU01
Subsection 02 – Subdivision Information	SU02	Ability to maintain a history of canceled subdivisions.	8_Minimum	yes	Add the ability to track history for subdivisions	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	SU01
Subsection 02 – Subdivision Information	SU03	Ability to maintain individual field for subdivision status (active/canceled).	10_Available	yes	Add a field for subdivision status	Vision CAMA /AA	GAP	\$ 4,900.00	Yes	SU01
Subsection 02 – Subdivision Information	SU04	Ability to store history of re-plats (keep subdivision # of canceled subdivision associated with new subdivision #).	8_Minimum	yes	Add the ability to store and track the history of re-plats	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	SU01
Subsection 02 – Subdivision Information	SU10	Ability to maintain spatial reference to the subdivision number (i.e. X and Y coordinates)	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Subdivision Information	SU15	Ability to associate a value model with a subdivision	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 02 – Subdivision Information	SU16	Ability to track new subdivisions from their creation through the revaluing of the new subdivision parcels.	10_Available	yes	Create a workflow process for the creation of a new subdivision.	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	SU01, WF01
Subsection 02 – Subdivision Information	SU20	Ability to assess a building on a property that was created for the future year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Subdivision Information	SU21	Ability to create new property accounts in new subdivisions for a future assessment year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Subdivision Information	SU30	Ability to create new subdivision accounts from a datafile as an automated batch process.	4_Significant	yes	Add the ability to process a new subdivision from a database via an automated batch process. This item requires more detail specifications but was expected	Vision CAMA /AA	GAP	\$ 14,000.00	Yes	SU01

					to be a couple of weeks worth of work.					
Subsection 03 – Land Data	LD01	Ability to maintain multiple zoning codes per parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Land Data	LD02	Ability to maintain individual fields for land descriptive information including items identified in the Land Table (current Oracle database).	10_Available	yes	Vision can track some but not all of the fields discussed during gap. The costs are to add the additional fields.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 03 – Land Data	LD10	Ability to populate land characteristics from data stored in GIS.	6_Moderate	yes	Integration with GIS required	Vision CAMA /AA & Interface	GAP	\$ 17,500.00		
Subsection 04 – Property Characteristics	CC01	Ability to account for multiple improvements on a single record.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Property Characteristics	CC02	Ability to maintain all property characteristics needed to develop and maintain valuation models.	10_Available	yes	Marked as GAP due to the work all but no cost associated	Vision CAMA /AA	GAP	\$ -		
Subsection 04 – Property Characteristics	CC03	Ability to maintain individual field for lead parcel.	8_Minimum	yes	Maricopa needs to indicate the lead parcel in an economic unit. The cost is to add the ability to select a lead parcel in the economic unit.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 04 – Property Characteristics	CC05	Ability to support the application of monthly, quarterly, and semi-annual time adjustment factors.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Property Characteristics	CC06	Ability to support the application of time adjustment factors in a linear or compounded fashion.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Property Characteristics	CC10	Ability to maintain multiple years of property data including past, present, and future years.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Property Characteristics	CC20	Ability to enter cost data into land improvements tables (e.g., landscaping, asphalt, offsites, etc.).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD01	Ability to maintain a sales history file with valuation capabilities that captures and freezes the property characteristics at the time of the sale.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD02	Ability to store an unlimited number of years of sales data.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD03	Ability to time adjust sale prices and display/store this information along with rate and associated tax year in separate fields.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD05	Ability to update CAMA and sales data from a single data entry point.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 05 – Sales Data	SD06	Ability to maintain individual field for number of parcels sold.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD08	Allows multiple occurrences of the same property in the sales file.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD09	Ability to create a master sale record which consolidates (summarizes) associated data into a single set of land and building characteristics and assessed values for ratio analysis and reporting.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD10	<del>Ability to store additional market data related to the sale transaction (i.e. time on market, original asking price, etc.).</del>	<del>10_Available</del>	<del>yes</del>	<del>Vision needs to add additional fields to store with the sale data.</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 7,000.00</del>	<del>-</del>	<del>-</del>
Subsection 05 – Sales Data	SD11	Ability to support the application of monthly, quarterly, and semi-annual time adjustment factors.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD15	Ability to correct property value and characteristics of sales history file based on historical valuation tables.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD16	Ability to perform manual edits of property characteristics in sales history file.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD17	Ability to maintain a history of mobile home sales together with a list of real property accounts to which the sale MH has been attached.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD18	Ability to tag sales in the sales history file for source, sale type, property type, and instrument (deed type).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD19	Ability to identify and associate parcel data from multiple parcels when sold on one deed.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD20	Ability to capture add/removal dates of mobile homes to real property for mobile homes sales records.	8_Minimum	yes	Add additional dates for the sale data for mobile homes and add the capture of dates to the workflow process.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 05 – Sales Data	SD21	Ability to create ad-hoc queries and generate reports from sales file.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD22	Ability to calculate the assessment to sale ratio on an individual parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD30	Ability to perform systemic archiving of sales records by date ranges.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 05 – Sales Data	SD31	Ability to manually correct an error in the active CAMA system which automatically reposts (updates) the time of sale parcel characteristics in the sales table.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD32	Ability to perform batch corrections and updates on the sales table data.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD33	Ability to correct mistakes found in the information posted to the sales table with audit trail (user, time/date, previous value, new value).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD40	Ability to calculate and display unit indicators (based on property type) including time adjusted sale price/square foot and time adjusted sale price/acre.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD50	Ability to link a sale to multiple parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD51	Ability to link multiple sales to a parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD52	Ability to designate lead parcel within in associated group of parcels from a multi-parcel sale.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD55	Ability to qualify, un-qualify, and re-qualify sales.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD70	Ability to exchange sales records with standard statistical software (NCSS, SPSS, etc.) without export to intermediary file format.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD90	Ability to exclude sales from sales ratio studies based on assessor and/or DOR qualification code.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD91	Ability to support the application of monthly, quarterly, and semi-annual time adjustment factors.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Sales Data	SD92	Ability to support the application of time adjustment factors in a linear or compounded fashion.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR01	Supports property valuation modeling.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR02	Ability to apply multiple models to a parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR03	Provides support for the development and calibration of linear, multiplicative, and hybrid multiple regression models.	10_Available	yes	Expansion of the base requirements to the Vision regression module	Vision CAMA /AA	GAP	\$ 131,250.00	Yes	MR03

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Subsection 06 – MRA	MR04	Ability to associate a model(s) with a specific year(s).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR05	Ability to generate income models (vacancy rate, expense rate, gross income, and capitalization rate models).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR06	Ability to generate apartment models (gross rent and gross rent multiplier models).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR07	Ability to indicate that values generated by the model(s) are preliminary.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR08	Ability to maintain a separate field for model ID.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR09	Ability to indicate that the value of a parcel was generated using multiple regression analysis and the model ID.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR10	Ability to mass update model name/model number to a group of parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR11	Ability to store with the parcel the coefficient for the associated model.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR12	Ability to adjust comparable sale prices based on coefficients produced by the regression analysis.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR13	Ability to expand, combine, and transform variables as needed for use in the regression analysis.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR20	Ability to compute standard IAAO statistics such as sales ratios, minimum, maximum, variance, mean, median, standard deviation, coefficient of variation, average absolute deviation, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR21	Ability to use the coefficient in recalculating values when attributes of the property have changed.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR22	Ability to identify outliers based on IAAO standards.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR23	Ability to create unlimited number and type (linear, log linear, etc.) of transformations.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR24	Ability to calculate the value for a single parcel or group of parcels.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 06 – MRA	MR25	Ability to designate dates for Effective On/Off associated with override preventing recalculation (such as with a common area or statutory properties).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 06 – MRA	MR40	Provides out-of-the-box integration with Arizona Segregated Cost Engine from Marshall & Swift.	6_Moderate	yes	Vision does not support Marshall and Swift Segregated.	Vision CAMA /AA	GAP	\$ 84,000.00	Yes	MR40
Subsection 06 – MRA	MR50	Ability to exchange data between the assessment application and SPSS (or similar) software.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 06 – MRA	MR51	Supports data transformations and statistical model analysis from SPSS or similar statistical analysis modeling applications.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 06 – MRA	MR52	Ability to store coefficient output from SPSS for modeling and subsequently apply to a select parcel or group of parcels.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 06 – MRA	MR53	Ability to select unlimited number of variables for export to SPSS.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – “What If” Scenarios	CW0 1	Provides "what-if" functionality to test the impacts of proposed data changes and valuation changes on any year or range of years.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – “What If” Scenarios	CW0 2	Ability to run “what if” scenarios against a single parcel, a group of parcels, or the entire roll.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – “What If” Scenarios	CW0 3	Ability to calculate and view the current year's values based on varying valuation scenarios prior to posting the property's final value.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – “What If” Scenarios	CW0 4	Ability to test the impact to values and sales ratios when changes are made to cost tables and parcel characteristics.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST01	Ability to calculate median and mean rent per unit of measure, expense ratios, market rents, vacancy levels, gross income multipliers, and overall capitalization rates for any strata of commercial property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST02	Ability to display assessment to sale ratio information for a group of parcels, including viewing the information using GIS (i.e. Providing a GIS layer which displays A/S ratio information for	10_Available	yes		Vision CAMA /AA	FIT			

		ranges such as 80-85%, 85-90%, 90-95%, etc.).								
Subsection 08 – Statistics	ST03	Ability to calculate the assessment to sale ratio on an individual parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST04	Ability to graphically depict sales ratio statistic results (charts, graphs, etc.).	10_Available	yes	Add the ability to graphical report sales ratio statistics	Vision CAMA /AA & 3rd Party Software	GAP	\$ 14,000.00		
Subsection 08 – Statistics	ST05	Ability to calculate any/all central tendency statistics for any data characteristic.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST10	Ability to calculate assessment/sale ratio on the sale price and/or adjusted sale price.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST11	Provides tools to calibrate cost and depreciation tables and neighborhood land and building adjustments.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST12	Ability to develop and apply statistical valuation models to subject records of the same type, same location and with the same units of comparison.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST13	Ability to incorporate time adjustments into sales and ratio studies.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST14	Ability to generate a standard ratio report by user specified criteria.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 08 – Statistics	ST50	Ability to integrate various SPSS (or similar) statistical modeling applications and transformations of variables.	10_Available	yes		Vision CAMA /AA & 3rd Party Software	FIT			
Subsection 09 – Comparable Sales	CO01	Provides a comparable sales search tool that enable users to search for comparable sales within a user-defined radius from the subject.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO02	Provides an automatic comparable sale comparison feature resulting in Board-ready comparable sale report listing sales and value adjustments to sales and final adjusted sale price for each comparable.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO03	Ability to search for comparable sales using user-defined comparable selection criteria and produce an Application-	10_Available	yes	search for comparable	Vision CAMA /AA	FIT			

		recommended value.								
Subsection 09 – Comparable Sales	CO04	Ability to select comparable sales based on a statistical algorithm utilizing a set of user-defined criteria and weights.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO05	Ability to select and present individual property characteristics for subject and comparable property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO07	Ability to individually or universally adjust selection weights and characteristic adjustments.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO08	Supports separate property selection weights and property characteristic value adjustments (dollars and percentage).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO09	Provides an online search and listing of comparable properties to check for assessment uniformity and equity.	10_Available	yes	Vision shows comparable properties inside the application but does not currently show them online. The cost here would expose the comparable properties online.	Vision CAMA /AA	GAP	\$ 14,000.00		
Subsection 09 – Comparable Sales	CO10	Ability to override comparable sales returns to add or remove parcels manually.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO11	Ability to generate a comparable sales report including subject property, required minimum of 3 sales (preference of 5 sales), and photo images associated with each.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO12	Ability to manually select user-defined comparable.	10_Available	yes	Vision automatically selects the best comps which can be override with the top 20. This GAP is to allow the user to select any comparable not just in the top 20.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 09 – Comparable Sales	CO13	Ability to generate comparable sales for both vacant and improved parcels (including mobile homes).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO14	Ability to adjust selection criteria, and search area following the process of system generated comparable sales.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 09 – Comparable Sales	CO15	Ability to auto-calculate individual and gross comparable property adjustments.	10_Available	yes	In the current Vision product this is a GAP; however it is currently under development so there are no costs associated it at this time.	Vision CAMA /AA	GAP	\$ -		
Subsection 09 – Comparable Sales	CO16	Ability to override the Application-selected comparables and/or individual characteristic adjustments.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO17	Ability to recalculate results based on new comparables and/or adjustment rates.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO18	Ability to view adjustments to comparables in percentages as well as dollar values.	10_Available	yes	The application supports comparables as dollar values so displaying the percentages is a GAP. Vision would add the ability to display the percentages.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 09 – Comparable Sales	CO19	Ability to base adjustments on coefficients produced by SPSS.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO20	Provides option to view comparable sale properties alone or with simultaneous viewing of the subject property and three or more comparables.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO21	Ability to apply sales comparison models to all classes of property (commercial, residential, agricultural, personal, etc.)	10_Available	yes	Add the ability move unsecured mobile homes into comparables	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 09 – Comparable Sales	CO30	Ability to view comparable sales report online and to print the report.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO31	Ability to save the comparable sales report (or the report parameters) as part of an appeal/inquiry history.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO50	Ability to input a monthly trend factor for time which is applied to the sales selected for the sale report.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Comparable Sales	CO70	Provides integration with GIS for viewing of comparable sales in relation to the subject property.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA01	Ability to maintain situs address.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA02	Ability to associate multiple parcels to a single owner or owners.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 01 – Name/Address	SNA03	Ability to associate multiple ownership classifications (such as mortgage company, agent, corporate entity, etc.) with a parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA04	Ability to associate and maintain multiple addresses with an account/parcel (i.e. mailing, situs).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA05	Ability to indicate “active” mailing address on parcels containing multiple addresses (i.e. for those that live in area on a seasonal basis).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA06	Ability to support international mailing addresses.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA07	Ability to maintain email address and effective date of email address.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA10	Ability to establish an owner ID for each unique owner.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA11	Ability to indicate the primary owner.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA12	Ability to maintain unlimited number of years of ownership information.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA13	Ability to accommodate properties/accounts with multiple owners.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA14	Ability to classify nature of ownership when multiple owners are associated with a property/account (e.g., contract buyer, spouse, etc.).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA15	Ability to restrict total combined percentage ownership to 100% for parcels and mobile homes for exemptions.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA16	Ability to capture multiple aliases for an Owner (individual or company) which resolve to the same record.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA17	Ability to identify and return all owner properties when searching by an alias.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA18	Ability to capture and report on percent ownership for each owner on an account where multiple owners are indicated.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA19	Ability to allocate percentage ownership to an individual partial	10_Available	yes		Vision CAMA /AA	FIT			

		owner.								
Subsection 01 – Name/Address	SNA20	Ability to track name changes and reference name change history.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA21	Ability to classify owners as: Owner, Buyer, and In-Care-Of, and store and cross-reference DBA name for the owner.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA25	Ability to track returned mail by flagging each parcel containing an incorrect mailing address.	10_Available	yes	Allow a user to set a bad address flag which will trigger the parcel into a workflow to correct the address	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 01 – Name/Address	SNA26	Ability to automatically remove returned mail flag when a new mailing address is entered.	8_Minimum	yes	Remove the bad address flag when the address is updated.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Name/Address	SNA30	Ability to auto-populate City and State fields upon entry of Zip Code.	8_Minimum	yes	Vision does not currently auto populate the city and state based on the zip code. Vision would add this support based on a standardize	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 01 – Name/Address	SNA31	Ability to accept automatic updates from data files using a repeatable, configurable workflow process.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA32	Ability to submit address changes (Real, Personal, and MH) from externally-facing self-service interface and flag as pending until data is verified.	8_Minimum	yes	Vision will add a API call to allow for an address change and put it into a pending state for review. The pending state will be linked to a workflow item.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
<del>Subsection 01 – Name/Address</del>	<del>SNA33</del>	<del>Provides address verification reports in both in electronic media and greenbar.</del>	<del>6_Moderate</del>	<del>yes</del>	<del>Vision is printer independent. The GAP here is to generate the report on the address verification results.</del>	<del>Vision CAMA /AA</del>	<del>GAP</del>	<del>\$ 7,000.00</del>	<del>-</del>	<del>-</del>
Subsection 01 – Name/Address	SNA34	Ability to process address changes as single-entry or batch when received for a single owner with multiple accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA35	Ability to evaluate new addresses at the time of entry to determine if it is a potential duplicate.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA40	Ability to notify staff during the ownership process if a parcel is currently exempt (solution prompts the user to decide if they wish to remove the exempt status during the editing process).	10_Available	yes	Vision is a trigger that will be added to the workflow for deed processing.	Vision CAMA /AA	GAP	\$ 4,200.00	Yes	WF01

Subsection 01 – Name/Address	SNA5 0	Ability to CASS (Coding Accuracy Support System) certify mailing address information through integration with a third party mailing address verification application.	6_Moderate	yes	Integration into CASS certification system	Vision CAMA /AA & 3rd Party Software	GAP	\$ 14,000.00	-	-
Subsection 01 – Name/Address	SNA5 1	Provides standardized name and mailing address format throughout the solution.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA6 0	Ability to present (in chronological order) the ownership history of a property/account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA6 1	Ability to retain "title chain" information for both active and inactive (canceled) properties.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA6 2	Ability to associate a personal property account with a real property account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Name/Address	SNA6 3	Ability to group accounts by a pre-determined common data element such as: Name, address, or other key data element the County may determine appropriate.	10_Available	yes	Vision allows the grouping of account via an aka name. The GAP is some of the other data elements required by the County.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 02 – Deed Processing	SDP0 5	Ability to edit history entries that are the result of data entry errors with audit trail.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP1 0	Ability to update ownership information based on deed transactions.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP1 1	Ability to identify an ownership change and trigger the need for updated forms.	8_Minimum	yes	Add additional setups to the workflow on ownership change. Alternatively a report could be developed to identify accounts.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 02 – Deed Processing	SDP1 5	Provides a trigger to copy grantor name to grantee name field during transfer process.	8_Minimum	yes	Provide the ability to populate that grantee field from the previous sale record.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 02 – Deed Processing	SDP2 0	Ability to add and categorize notes in parcel's history.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP2 1	Ability to automatically record activities performed against a record (splits, combos, resolutions, name changes, address changes, revaluation, and legal description changes) in the history of a property.	10_Available	yes	The major of this functionality is support with the exception of mailing address changes for the owner.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 02 – Deed Processing	SDP2 2	Ability to capture all changes, notes and updates associated to the property in the property's history.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 02 – Deed Processing	SDP2 3	Ability to record narrative comments against the property/account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP2 5	Ability to perform an annexation update as a batch process on multiple accounts or manually on a single account.	8_Minimum	yes	Vision would create an import that could be used to integrate with GIS.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Deed Processing	SDP2 6	Ability to update tax code areas on associated personal property accounts when an annexation update is performed on an associated real property account.	10_Available	yes	Vision would add this check to when processing a tax code change on a parcel. The user would be allowed to update the personal property record or move the record to a workflow for review by another team.	Vision CAMA /AA	GAP	\$ 4,900.00	Yes	WF01
Subsection 02 – Deed Processing	SDP2 7	Ability to query and display annexation history of a property, the dates associated with the annexation, and the appearance of the property before and after the annexation.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP3 0	Ability to view historic information on inactive/retired properties/accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP3 1	Ability to present (in chronological order) the value history of a property/account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP4 0	Ability to store and display an abbreviated legal description.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP4 4	Ability to format legal description using rich text document or HTML.	6_Moderate	yes	Fields are plain text and would need to be converted. Vision controls currently do not support HTML so these would need to get updated.	Vision CAMA /AA	GAP	<del>\$ 7,000.00</del>	-	-
Subsection 02 – Deed Processing	SDP5 0	Ability to differentiate between leases from current year and future year	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP5 1	Ability to recognize an expired lease and automatically expire and/or notify when it is approaching	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 02 – Deed Processing	SDP7 0	Ability to store link to the recorded document image in Recorder's application for record maintenance activities.	10_Available	yes	Vision is working on the ability to store a link to a document. This functionality described here does not require any additional cost.	Vision CAMA /AA	GAP	\$ -		
Subsection 03 – Redactions	SR01	Ability to accommodate court-ordered redactions to suppress public access to information for property owners.	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 03 – Redactions	SR02	Maintains an individual field for redaction flag.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Redactions	SR03	Maintains an individual field for date the document was filed.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 03 – Redactions	SR05	Ability to automatically generate notification to Web Solutions to remove name and address (mailing and situs) information associated with a redacted parcel from the website.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 03 – Redactions	SR06	Maintains a separate field for docket/court redaction order number.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 03 – Redactions	SR10	Ability to identify when an owner has multiple properties and alert or enforce the redaction on all associated properties.	8_Minimum	yes	Logic- code	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 03 – Redactions	SR11	Ability to suppress access to redacted data to certain roles or users via application security (prevent Call Center access to redacted information).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Historic Property	SSH01	Ability to differentiate between Residential and Commercial accounts designated as historic.	10_Available	yes	Handling and processing of the legal class (previous GAP item) handles much of this work; however, there are some additional costs required for historic properties	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 04 – Historic Property	SSH02	Ability to maintain historical value distinctly from Full Cash value for Commercial accounts designated as historic.	10_Available	yes	Handling and processing of the legal class (previous GAP item) handles much of this work; however, there are some additional costs required for historic properties	Vision CAMA /AA	GAP	\$ 8,400.00		
Subsection 04 – Historic Property	SSH03	Ability to maintain information regarding the date historic property verification was requested, approval status, approval date, and the individual who processed the application.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 04 – Historic Property	SSH10	Ability to identify and flag owners with more than one account designated as historic.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 04 – Historic Property	SSH69	Ability to generate letter(s) and other correspondence for historic property owners.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 04 – Historic Property	SSH70	Ability to scan and attach documentation (from the State Historic Preservation Officer) to the parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE01	Ability to process exempt properties through the assessment cycle (establish market values).	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE03	Ability to indicate that a given account, person, or parcel is a participant in a special program (such as Legal Class Verification).	10_Available	yes	Add the ability to flag an account that is in special program during the workflow process.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 05 – Exemptions	SSE04	Ability to indicate on a record (account, person, parcel) the special programs that have been applied with link to associated application.	8_Minimum	yes	Link to the application stored in OnBase	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 05 – Exemptions	SSE05	Supports partial exemptions when a parcel is mixed-use.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE09	Ability to store and display the filing information for each exemption or special program account.	10_Available	yes	Backup documents - income info - owner and parcel information	Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE10	Ability to track and store all notes, data files, scanned documents, etc. associated with the special program application process and identify them as such.	10_Available	yes	Property Notes - Comment area on exemption - scanned documents - central repository	Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE11	Ability to monitor the progress of a special program application, from the time of submission, to either approval or denial of the application.	6_Moderate	yes	Add the ability to view the status of the workflow for a special program application	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 05 – Exemptions	SSE14	Ability to identify lowest parcel value (market or frozen or rollover) and place exemption accordingly.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE15	Ability to represent the assessment ratio to 1% for the square footage of property designated to the charter school.	8_Minimum	yes	Charter School doesn't own the property - lease - application - annual issue - prorate the value as to how much the property is being used for the charter school. Add the ability to indicate how much of the property is used by the Charter School	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 05 – Exemptions	SSE20	Ability to link exemption to name and mailing address.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE21	Ability to link exemption to name and situs address.	8_Minimum	yes		Vision CAMA /AA	FIT			

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Subsection 05 – Exemptions	SSE2 2	Ability to capture and manage multiple addresses for a given exemption.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE2 3	Ability to apply more than one exemption to an account/person/parcel.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE2 4	Ability to apply an exemption to more than one account/person/parcel.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE3 0	Ability to generate online letters for parcel owners regarding the status of their exemption application.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 05 – Exemptions	SSE3 1	Ability to generate online letters for parcel owners regarding the status of their classification application.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 05 – Exemptions	SSE4 0	Provides facility for defining attributes that determine exemption eligibility.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE4 1	Ability to configure program-specific steps for in the definition of special programs.	6_Moderate	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 10,500.00	Yes	WF01
Subsection 05 – Exemptions	SSE4 2	Ability to view program criteria on an account by which a property owner's application has been approved or denied.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE5 0	Ability for user to select account/person/parcel for audits by defined selection criteria.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE5 1	Ability for user to select account/person/parcel for audits by manual selection.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE5 2	Ability to generate audit letters and forms of property owners using account/person/parcel selected for audits.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE5 3	Ability to track the audit process for account/person/parcel selected to be audited.	6_Moderate	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 05 – Exemptions	SSE6 0	Provides a configurable workflow process to track the activity of an exemption from mailing the form (application), to receipt of the form, verification, application update, property owner notification, new taxation application update, audit, etc.	6_Moderate	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 28,000.00	Yes	WF01

Subsection 05 – Exemptions	SSE6 1	Provides integration with all other valuation programs such that when value change is completed, the change can automatically adjust the associated exemption values/calculation accordingly.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE7 0	Provides configurable notification options (alerts, emails, etc.) to indicate when a change might influence the eligibility of a person/property/account for an exemption or special program.	6_Moderate	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 05 – Exemptions	SSE7 1	Facilitates proactive notification of and response to pending expirations via configurable reports, letters, online queues, and alerts.	8_Minimum	yes	Extension of the base workflow functionality and expansion of the report wizard	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 05 – Exemptions	SSE7 2	Facilitates renewal process by providing configurable reports, letters, online queues, and alerts.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 7,000.00	Yes	WF01
Subsection 05 – Exemptions	SSE8 0	Ability to ensure that all properties (or portions of properties) removed from a special program are revalued at full market value for the applicable assessment year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 1	Ability to populate default values for an exemption when associated parcel or account has been identified.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 2	Ability to value a portion of a property under special program, while the remainder of the property is valued at full market value.	8_Minimum	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 3	Ability to apportion the value of a parcel to percentages of taxable and exempt for taxing purposes.	6_Moderate	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 4	Ability to retain at least 5 years of special program valuation history for use in rollbacks, if necessary.	4_Significant	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 5	Ability to automatically calculate the special program assessed value when there is a change to the land characteristics without the duplicate data entry or batch updates.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 05 – Exemptions	SSE8 6	Ability to automatically calculate the special program assessed value when there is a change in the market value of a property without the duplicate data entry or batch updates.	10_Available	yes		Vision CAMA /AA	FIT			

Subsection 05 – Exemptions	SSE87	Ability to adjust the amount of personal exemptions by subtracting mobile home value.	8_Minimum	yes	Add the ability to associate the remainder of the personal exemption on the mobile home to the real property record	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 05 – Exemptions	SSE88	Ability to automatically calculate new rates and update the valuation table(s).	10_Available	yes	This is a gap for regression but not the other valuation in Vision. The cost is included in the regression estimate.	Vision CAMA /AA	GAP	\$ -		
Subsection 05 – Exemptions	SSE90	Ability to void the removal of a special program, retaining the history of the removal activity and the voiding of the transaction.	6_Moderate	yes	Add the ability to remove the special program	Vision CAMA /AA	GAP	\$ 10,500.00		
Subsection 06 – Rental Registrations	SRR02	Ability to link rental registration(s) to owner(s).	8_Minimum	yes	Add the ability to link the rental registration to the property record. This step should happen during work flow.	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 06 – Rental Registrations	SRR03	Ability to manually enter rental registration information.	8_Minimum	yes	Add the ability to add a rental registration manually and tie it into the workflow	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 06 – Rental Registrations	SRR04	Ability to indicate the property is presently used as a rental.	8_Minimum	yes	Add the ability to mark the property as rental property	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR05	Ability to define validations to indicate when inaccurate or missing information prevent the rental registration from being processed.	8_Minimum	yes	Extension of the base workflow functionality specific to rental registration	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 06 – Rental Registrations	SRR06	Ability to generate an alert for a rental property when ownership changes.	8_Minimum	yes	Trigger a new workflow when the rental property sells	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 06 – Rental Registrations	SRR07	Ability to indicate rental registry fee has been paid on a rental property.	8_Minimum	yes	Add data element to indicate of the rental registration fee was paid	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR10	Maintains a separate field to indicate application date.	8_Minimum	yes	Add data element to store the rental application date	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR11	Maintains a separate field to indicate telephone number.	8_Minimum	yes	Add data element to store a telephone number	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR12	Maintains a separate field to indicate business entity type.	8_Minimum	yes	Add data element to store a business entity type	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR13	Ability to view property type such as mobile homes, apartments, etc.	8_Minimum	yes	Add the ability to view the type of property during the processing of the rental registration	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 06 – Rental Registrations	SRR15	Ability to identify criteria or record changes where upon user would be notified that the rental registration may no longer apply.	8_Minimum	yes	Add business rule to indicate of the rental registration no longer applies.	Vision CAMA /AA	GAP	\$ 3,500.00		

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Subsection 06 – Rental Registrations	SRR20	Ability for taxpayers to enter rental registration information online.	6_Moderate	yes	Add the ability to enter the rental registration online and process the data via a feed from the web site (real time or batch)	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 06 – Rental Registrations	SRR21	Ability to identify properties that have been notified to submit rental registration form.	8_Minimum	yes	Extension of the base workflow functionality for rental registration	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 06 – Rental Registrations	SRR22	Ability to produce a file of notified properties in Excel format.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Legal Class Code	LCC05	Maintains a separate field for legal class code.	10_Available	yes	Class code and Subcode up to 4 codes, 4 for land, 4 for improvement. 13 subcodes. 8 fields per parcel. Vision needs to add some additional fields to store the data	Vision CAMA /AA	GAP	\$ 8,400.00		
Subsection 07 – Legal Class Code	LCC08	Ability to correct the tax roll for legal class code errors for up to three prior years or for future years.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Legal Class Code	LCC09	Ability to provide a prompt during data entry for legal class changes that gives the user the option to automatically change legal class in current and future years.	8_Minimum	yes	Add the ability to change the legal class in multiple years	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 07 – Legal Class Code	LCC10	Ability to define criteria by which accounts are selected for Legal Class Verification.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Legal Class Code	LCC11	Ability to override accounts selected for Legal Class Verification (prior to mailing) by adding/removing them from the recordset.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 07 – Legal Class Code	LCC20	Ability to notify owner of a legal class change though the generation of a letter.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 07 – Legal Class Code	LCC21	Ability to generate letter to parcel owner if legal classification verification is required.	8_Minimum	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 08 – Common Area	SCA01	Ability to combine a set of parcels (upon approval of application) to a combined parcel number for valuation purposes.	10_Available	yes	Extension of the base workflow functionality	100000	GAP	\$ 3,500.00	Yes	WF01
Subsection 08 – Common Area	SCA02	Ability to retain combined area status following the completion of merge or split process.	10_Available	yes	Extension of the base workflow functionality	8725	GAP	\$ 3,500.00	Yes	WF01
Subsection 09 – Senior Valuation Protection	SVP02	Ability to assign Senior Valuation Protection applications by application date for processing.	6_Moderate	yes	Extension of the base workflow functionality	0.08725	GAP	\$ 7,000.00	Yes	WF01

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Subsection 09 – Senior Valuation Protection	SVP03	Ability to notify owner though the generation of a letter indicating approved/denied decision.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 09 – Senior Valuation Protection	SVP04	Ability to link to associated documents, files, correspondence, etc. related to the account with SVP application.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 09 – Senior Valuation Protection	SVP05	Ability to generate notices communicating with property owners who qualify for a senior citizen valuation protection. <del>indicating that no taxes are due.</del>	10_Available	yes	Extension of the base workflow functionality and expansion of the report wizard	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 09 – Senior Valuation Protection	SVP10	Ability to prompt users during data entry for parcel split changes, notifying the user if a parcel currently has Senior Valuation Protection.	8_Minimum	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 09 – Senior Valuation Protection	SVP11	Ability to apply property value freeze to both qualified real property and personal property from a single data entry point.	6_Moderate	yes	Vision current supports value freeze for real estate but not personal property.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 09 – Senior Valuation Protection	SVP12	Ability to apply property value freeze to both primary parcel and any qualifying associated parcels	10_Available	yes	Vision needs to support the application of value freeze to associated parcels	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 10 - Customer Service	SCS02	Ability to query an account or owner by, at minimum, the following: number, name, site address, mailing address, plat, wild card.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 10 - Customer Service	SCS10	Ability to add queriable transactional notes/comments to a property owner account.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 10 - Customer Service	SCS20	Ability to capture the actual individual image of the statement that was mailed to the Property Owner.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 10 - Customer Service	SCS30	Ability to track status of public document requests.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 10 - Customer Service	SCS31	Ability to internally track status of a property owner initiated account information change e.g. name/address change.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 10 – Customer Service	SCS32	<del>Ability to track the status of refunds, including type of refund, date entered, date of check, and date mailed.</del>	<del>0_Can't Provide</del>	<del>no</del>	<del>We cant provide or would have to have interface with Treasurer to use user fields and set up an entire new UI module for viewing this information. This would be coming from another Dept.</del>	<del>N/A</del>	<del>NA</del>	<del>-</del>	<del>-</del>	<del>-</del>

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Subsection 10 - Customer Service	SCS4 0	Ability to initiate email correspondence via email client integration or inherent functionality.	10_Available	yes	Integration with an SMTP server is on Vision's roadmap and would result in no additional cost for Maricopa	Vision CAMA /AA & 3rd Party Software	GAP	\$ -		
Subsection 10 - Customer Service	SCS4 1	Ability to attach files stored either internally or externally to system-generated emails.	10_Available	yes	Integration with an SMTP server is on Vision's roadmap and would result in no additional cost for Maricopa	Vision CAMA /AA	GAP	\$ -		
Subsection 10 - Customer Service	SCS4 2	Ability to export or print key data regarding Property Owner account	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 11 – Management	SSM0 1	Provides tools for the management of record maintenance activities.	10_Available	yes		Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 11 – Management	SSM0 2	Ability to manage assignment and status of record maintenance activities.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 11 – Management	SSM0 3	Ability to capture and track status and category of record maintenance activities.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 12 - Resolutions	SSR0 1	Provides facility for tracking requested changes for accounts for approved resolutions.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR0 2	Ability to access and edit prior year's information (value, tax billing, receipt/payment information) to generate a corrected (or new) value for the prior year as result of a split, combo, or similar parcel maintenance activity while retaining original value.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR0 3	Ability to create prior year's information (value, tax billing, receipt/payment information) to generate a corrected (or new) value for the prior year as result of a split, combo, or similar parcel maintenance activity.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR0 4	Ability to add or edit prior year information after it has been archived from the database.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR0 5	Ability to edit or create prior year's information either by single account or multiple accounts.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR0 6	Ability to automatically update the data with corrected/new values and generate the associated paperwork.	10_Available	yes	Included in the base workflow price	Vision CAMA /AA	GAP	\$ -	Yes	WF01
Subsection 12 - Resolutions	SSR0 7	Ability to verify and notify when a resolution has been entered for a given property.	10_Available	yes	Included in the base workflow price	Vision CAMA /AA	GAP	\$ -	Yes	WF01

Subsection 12 - Resolutions	SSR1 0	Ability to restrict edits/additions to prior year information through system security.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 12 - Resolutions	SSR1 1	Ability to capture full audit trail (user, time, previous value, new value, etc.) when an edit/addition is made to a prior year.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM0 1	Ability to track merges from their initial creation to the revaluating of the resulting parcel(s).	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Parcel Split/Merge	PSM0 2	Ability to track splits from their creation through the revaluation of all parcels associated with the split.	10_Available	yes	Extension of the base workflow functionality	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Parcel Split/Merge	PSM0 3	Ability to accommodate an <del>unlimited number</del> up to 5,000 properties when recording a merge.	8_Minimum	yes	Generally this item is a FIT; however, unlimited is dangerous. No cost was assigned as the system supports property merging, but not unlimited.	Vision CAMA /AA	GAP	\$ -		
Subsection 01 – Parcel Split/Merge	PSM0 4	Ability to segregate (split) properties, in an automated manner that requires minimal data entry by the user.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM0 5	Ability to reconstruct the "genealogy" of a parcel following the recording of a split or merge transaction not limited by number of previous splits/merges.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM0 6	Ability to view the "genealogy" of a split/merge parcel on a single screen.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM0 7	Ability to copy/paste/move data, photos and sketches from one parcel to another based on user defined criteria or business rules.	10_Available	yes	Vision copy and move building wizard copies/moves data between parcels. The GAP is surrounding the business rules.	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 01 – Parcel Split/Merge	PSM1 0	Ability to create and maintain a link between parent parcel and child parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM1 1	Ability to ensure that child parcels require a link to a parent parcel during the creation of new parcels.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM1 2	Ability to apply the parent parcel legal description to the child(ren) if desired.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM1 3	Ability to copy additional data attributes from the parent parcel to child parcel(s) as specified by the user (i.e. soil type, special districts).	10_Available	yes		Vision CAMA /AA	FIT			

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Subsection 01 – Parcel Split/Merge	PSM14	Ability to automatically update effected years based on indicated apportionment.	8_Minimum	yes	Need the ability to update other year databases	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 01 – Parcel Split/Merge	PSM30	Ability to associate personal property account and tax area code to a parcel resulting from a split or merge.	8_Minimum	yes	This is a workflow item as well as the linking the real and personal accounts	Vision CAMA /AA	GAP	\$ 3,500.00	Yes	WF01
Subsection 01 – Parcel Split/Merge	PSM31	Ability to accommodate properties with exemptions and protections when recording a split or merge.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM40	Ability to represent a parcel with two associated tax area codes without generating additional parcel records.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM50	Ability to access comprehensive Parcel History--showing change in LPV, FCV, property use, characteristics, etc.	10_Available	yes		Vision CAMA /AA	FIT			
Subsection 01 – Parcel Split/Merge	PSM97	Ability to consume and utilize GIS data containing parent parcel and resultant parcel(s) information to influence resulting values, size, topography, ownership, etc. in order to record a split on a given property.	4_Significant	yes	Integration with GIS required	Vision CAMA /AA	GAP	\$ 19,250.00		
Subsection 01 – Parcel Split/Merge	PSM98	Ability to store and view the historical data resulting from the completion of a split/merge in both the GIS and CAMA/Assessment Administration solution.	10_Available	yes	Integration with GIS required	Vision CAMA /AA	GAP	\$ 7,000.00		
Subsection 02 – Sketches/Photos/CAD Drawings	SPC01	Ability to link sketches to the parcel fabric.	6_Moderate	yes	Vision would need to export the sketch as a shape file.	Vision CAMA /AA	GAP	\$ 17,500.00		
Subsection 02 – Sketches/Photos/CAD Drawings	SPC02	Ability to rotate/mirror/flip sketch to correctly align with aerial photograph.	6_Moderate	yes	These tools are available inside the sketch tool. They would need to get applied to the sketch overlay on GIS.	Vision CAMA /AA	GAP	\$ 17,500.00		
Subsection 02 – Sketches/Photos/CAD Drawings	SPC03	Ability to tie sketch to building footprint layer through the use of GPS coordinates.	6_Moderate	yes	Integration with GIS required and the ability to store the GPS coordinates with the sketch	Vision CAMA /AA	GAP	\$ 17,500.00		
Subsection 02 – Sketches/Photos/CAD Drawings	SPC04	Ability to link photos to the parcel fabric.	8_Minimum	yes	Photos are in linked to parcel. Or CAMA can show a feature class that holds the photos. Can also link to Pictometry or other resources with a key. Specific integration with GIS is a GAP.	Vision CAMA /AA	GAP	\$ 3,500.00		
Subsection 02 – Sketches/Photos/CAD Drawings	SPC05	Ability to copy a sketch from one parcel to one or more parcels.	10_Available	Yes		Vision CAMA /AA	FIT			

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Subsection 02 – Sketches/Photos/CAD Drawings	SPC09	Ability to print GIS views including the display of CAMA/Assessment Administration thematic information.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 02 – Sketches/Photos/CAD Drawings	SPC10	Ability to automatically update recorded building square footage to reflect the building square footage from the building sketch.	10_Available	Yes		Vision CAMA /AA	FIT			
Subsection 02 – Sketches/Photos/CAD Drawings	SPC15	Ability to value all structures with or without a sketch associated to the property.	10_Available	Yes		Vision CAMA /AA	FIT			



## APPENDIX 2, CONTRACTOR TRAVEL AND PER DIEM POLICY

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- 1.0 All contract-related travel plans and arrangements shall be prior-approved by the County Contract Administrator.
- 2.0 Lodging, per diem and incidental expenses incurred in performance of Maricopa County/Special District (County) contracts shall be reimbursed based on current U.S. General Services Administration (GSA) domestic per diem rates for Phoenix, Arizona. Contractors must access the following internet site to determine rates (no exceptions): [www.gsa.gov](http://www.gsa.gov)
  - 2.1 Additional incidental expenses (i.e., telephone, fax, internet and copying charges) shall not be reimbursed. They should be included in the contractor's hourly rate as an overhead charge.
  - 2.2 The County will not (under no circumstances) reimburse for Contractor guest lodging, per diem or incidentals.
- 3.0 Commercial air travel shall be reimbursed as follows:
  - 3.1. *Coach airfare will be reimbursed by the County. Business class airfare may be allowed only when preapproved in writing by the County Contract Administrator as a result of the business need of the County when there is no lower fare available.*
  - 3.2. *The lowest direct flight airfare rate from the Contractors assigned duty post (pre-defined at the time of contract signing) will be reimbursed. Under no circumstances will the County reimburse for airfares related to transportation to or from an alternate site.*
  - 3.3. *The County will not (under no circumstances) reimburse for Contractor guest commercial air travel.*
- 4.0 Rental vehicles may only be used if such use would result in an overall reduction in the total cost of the trip, not for the personal convenience of the traveler. Multiple vehicles for the same set of travelers for the same travel period will not be permitted without prior written approval by the County Contract Administrator.
  - 4.1. Purchase of comprehensive and collision liability insurance shall be at the expense of the contractor. The County will not reimburse contractor if the contractor chooses to purchase these coverage.
  - 4.2. Rental vehicles are restricted to sub-compact, compact or mid-size sedans unless a larger vehicle is necessary for cost efficiency due to the number of travelers. (NOTE: contractors shall obtain pre-approval in writing from the County Contract Administrator prior to rental of a larger vehicle.)

- 4.3. County will reimburse for parking expenses if free, public parking is not available within a reasonable distance of the place of County business. All opportunities must be exhausted prior to securing parking that incurs costs for the County. Opportunities to be reviewed are the DASH; shuttles, etc. that can transport the contractor to and from County buildings with minimal costs.
  - 4.4. County will reimburse for the lowest rate, long-term uncovered (e.g. covered or enclosed parking will not be reimbursed) airport parking only if it is less expensive than shuttle service to and from the airport.
  - 4.5. The County will not (under no circumstances) reimburse the Contractor for guest vehicle rental(s) or other any transportation costs.
- 5.0 Contractor is responsible for all costs not directly related to the travel except those that have been pre-approved by the County Contract Administrator. These costs include (but not limited to) the following: in-room movies, valet service, valet parking, laundry service, costs associated with storing luggage at a hotel, fuel costs associated with non-County activities, tips that exceed the per diem allowance, health club fees, and entertainment costs. Claims for unauthorized travel expenses will not be honored and are not reimbursable.
- 6.0 Travel and per diem expenses shall be capped at \$512,804 for the duration for the implementation period.



APPENDIX 3, SCOPE OF WORK SUPPORT DOCUMENTS

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- A. Data Migration Assumptions and Acceptance Criteria**
- B. Report Assumptions**
- C. Integration Assumptions**
- D. New Functionality**
- E. Deliverable Acceptance Statement Form**
- F. No Cost Task Modification Form**
- G. Formal Change Order Request (Cost)**

**A: DATA MIGRATION ASSUMPTION & ACCEPTANCE CRITERIA**

This attachment addresses two topics as starting points for the Data Migration Track.

1. Known sources of data to be migrated to the System.
2. Initial criteria for the acceptance of migrated data.

**KNOWN DATA SOURCES:**

The following sources of production data shall be considered the starting assumption for the Data Migration Track. As the planning task progresses, additional data sources may become evident.

**PAIS**

Production Assessor Information, also referred to as “Oracle”, “6i” and Secured or Unsecured

**Purpose:** Production data for the management of real and business personal property appraisal.

**Migration assumption:** The amount of data to migrate (# of Years), and the estimated number of records for each subject is provided for each subject area. Not all tables within PAIS are subject to migration.

DATA (SUBJECT AREAS)	DATA OWNER(S)	# OF YEARS	ESTIMATED # OF RECORDS
Residential Property Characteristics	Real Property	5	1.6M/Yr.
Land Characteristics	Real Property	5	1.7M/Yr.
Commercial Characteristics	Real Property	5	2.4M/Yr.
Personal Property Account Characteristics	Real Property	5	150K/Yr.
Apartment Characteristics	Real Property	5	12K/Yr.
Centrally Valued Property Characteristics	Real Property; Admin	5	1K/Yr.
Unsecured Mobile Home Characteristics	Real Property	5	56K/Yr.
Agriculture Characteristics	Real Property	7	17K/Yr.
Golf Characteristics	Real Property	10	15K/Yr.
Common Area Characteristics	Real Property	5	47K/Yr.
Valuation Information	Admin	5	1.6M/Yr.
Ownership Information	Ownership/Mapping	All History	4.2M (Total)
Situs Address Information	Real Property	All History	1.5M (Total)
Sales Information	Real Property	5	3M/Yr.
Parcel History	All	All History	14.4M (Total)
Personal Property Account History	Real Property	All History	320K (Total)
Appeals Information	Real Property; Litigation	5	15K/Yr.
Resolution Information	All	5	310K (Total)
Legal Class Information	Real Property	5	2.3M/Yr.
Subdivision Information	Real Property	5	30K/Yr.
Litigation Information	Litigation	6	25K (Total)
Exemptions (both Personal and Organizational)	Real Property	5	234K (Total)
Association Parcel Information	Real Property	5	114K/Yr.
Deed Information (including Title Chain Information)	Ownership/Mapping	All History	33M (Total)

DATA (SUBJECT AREAS)	DATA OWNER(S)	# OF YEARS	ESTIMATED # OF RECORDS
Business Equipment Information	Real Property	5	625K/Yr.
Splits Information	Real Property; Ownership/Mapping	5	75K/Yr.
Special District Information	Admin	5	2.3M/Yr.
Notice of Proposed Correction/Claim Information	All	5	20K (Total)
Rental Registration Information	Real Property	All History	360K (Total)
Senior Valuation Protection Information	Real Property	All History	40K (Total)
First and Final Re-class Information	Real Property	5	360K (Total)
Tax Information	Admin	5	12M/Yr.
Tax Roll Information	Admin	5	1.6M/Yr.

**OnBase**

Commercial off the Shelf application for use in content management, document management, etc.

[www.onbase.com](http://www.onbase.com)

**Purpose:** Currently being used as a workflow tool for the management of all appeals; and to store all appeals-related documentation.

**Migration assumption:** All documents that reside with any migrated appeal record should be related to the correct record in the System.

**APEX**

Commercial off the Shelf application for use in recording property sketches.

**Purpose:** Currently being used to capture property sketches.

**Migration Assumption:** All sketches related to a parcel will remain related to the correct parcel.

**DATA MIGRATION BALANCING TOLERANCES:**

During each data migration iteration, the following criteria shall be used as acceptance criteria. This may be overridden or appended as agreed to in the Data Migration Plan. Each balance tolerance shall be treated as a maximum variance, or the additional variance must be explained and accepted by the County.

From the RFP:

*Record Balancing*

- *Migrated records, by record type and subtype, shall balance to zero unexplainable discrepancies by count.*
- *Migrated records, by record type and subtype, shall balance to within \$500 in unexplainable discrepancies by dollar value.*
- *Migrated records, by record type and subtype, shall balance to within 0.25% in unexplainable discrepancies for any value where a sum total (other than dollars) can be used (e.g., square feet, linear feet, volume, etc.)*

Category	Criteria	Examples
<b>Real Property</b>		
1) Total parcel count broken down by 'active' and 'deleted' parcels certified tax year	Parcel count pre-conversion must equal parcel count post- conversion (active and deleted)	150,000 before = 150,000 after
2) Parcel counts by city by property class certified tax year	Parcel counts for each property class within a city or outside city boundaries.	101's in Phoenix before = 1,200 101's in Phoenix after = 1,220
3) Total full cash value (FCV) for certified tax year	Values must be an exact match	FCV prior = \$ 34,000,000,000 FCV after = \$ 34,000,000,000
5) Total assessed value (AV) for certified tax year	Values must be within 0.006% of one another	AV prior = \$19,000,000,000 AV after = \$19,000,000,000
8) Total real market value (RMV) for certified tax year by tax code area.	Values must be within 0.006% of one another	Tax Code area 015067 before = \$1,000,000 Tax Code area 015067 after = \$1,000,000
9) Total assessed value (AV) for certified tax year by tax code area.	Values must be within 0.006% of one another	Tax Code area 015067 before = \$680,000 Tax Code area 015067 after = \$680,000
9.1) Total net assessed value (NAV) for certified tax by code area	Values must be within 0.006% of one another	Tax Code area 015067 before = \$740,000 Tax Code area 015067 after = \$740,000
11) Total assessed value (AV) for certified tax year by tax code area.	Values must be within 0.006% of one another	Tax Code area 015067 before = \$240,000 Tax Code area 015067 after = \$240,000
12) Total exception NAV for certified tax year	Values must be an exact match	Exception NAV prior = \$80,000,000 Exception NAV after = \$80,000,000
13) Total parcel count broken down by 'active' and 'inactive' parcels current tax year	Parcel count pre-conversion must equal parcel count post- conversion (active and deleted)	150,000 before = 150,000 after
14) Parcel counts by city by property class current tax year	Parcel counts for each property class with a city or outside city boundaries must be an exact match.	101's in Phoenix before = 1,200 101's in Phoenix after = 1,220
15) Total real market value (RMV) for current tax year	Values must be an exact match	FCV prior = \$ 34,000,000,000 FCV after = \$ 34,000,000,000
17) Total assessed value (AV) for current tax year	Values must be within 0.006% of one another	AV prior = \$19,000,000,000 AV after = \$19,000,000,000
18) Total maximum assessed value (SAV)for current tax year	Values must be within 0.006% of one another	SAV prior = \$9,000,000,000 SAV after = \$9,000,000,000
19) Total full cash value (FCV) for current tax year by tax code area.	Values must be within 0.006% of one another	Tax Code area 015067 before = \$1,000,000 Tax Code area 015067 after = \$1,000,000
20) Total assessed value (AV) for current tax year by tax code area.	Values must be within 0.006% of one another	Tax Code area 015067 before = \$680,000 Tax Code area 015067 after = \$680,000

Category	Criteria	Examples
20.1) Total maximum full cash value (FCV) for current tax by code area	Values must be within 0.006% of one another	Tax Code area 015067 before = \$740,000 Tax Code area 015067 after = \$740,000
21) Total full cash value (FCV) exception value for current tax year	Values must be within 0.006% of one another	FCV prior = \$100,000,000 FCV after = \$100,000,000
22) Historical full cash values (FCV) county wide by year	Values must be an exact match back to 2010-2011	
23) Historical maximum assessed (NAV) county wide by year	Values must be an exact match back to 2010-2011	
24) Historical assessed values (AV) county wide by year	Values must be an exact match back to 2010-2011	
25) Historical secondary assessed values (SAV) county wide by year	Values must be an exact match back to 2010-2011	
26) Historical maximum secondary assessed values (MSAV) county wide by year	Values must be an exact match back to 2010-2011	
27) Total acres for certified tax year	Total summarized acre count should match before and after conversion.	Acre count prior = 322,017 Acre count after = 322,017
28) Total acres for current tax year	Total summarized acre count should match before and after conversion.	Acre count prior = 322,017 Acre count after = 322,017
29 ) Primary Residence Count	Total # of Primary Residences should match before and after conversion.	Primary Residence count prior = 121,676 Primary Residence count after = 121,676
30) Personal Exemption or Senior Counts	Run inventory of manual flags for Senior or Disabled counts	Senior or Disabled prior = 640 Senior or Disabled prior = 640
31) Commercial building sections	Commercial building sections' Marshall and Swift "occupancy code" must be maintained	Maricopa County uses the Marshall and Swift occupancy code.
31.2) Property Exemptions certified year	Calculate exemptions correctly to match within reasonable tolerances.	Exemptions Before= 10,000,0000 Exemption After 10,002,500

Category	Criteria	Examples
<p>32) Parcel level accuracy requirements</p>	<p>It is the County’s intent that all valid legacy data at the <b>parcel detail level</b> be converted into the System. Parcel data prior to conversion should be an exact match to parcel data after conversion. Examples of the type of data to be converted include but are not limited to those items shown at the right.</p> <p>Valid legacy data is defined as those items identified in the data migration plan to be converted.</p>	<ul style="list-style-type: none"> <li>• Adjustments to land</li> <li>• Building Class, and Sq.Ft.</li> <li>• Actual Year Built</li> <li>• Effective Year Built</li> <li>• Indexes ( quality, depreciation, neighborhood)</li> <li>• Bldg counts on a parcel must be equal</li> <li>• Land table</li> <li>• Land Classes</li> <li>• Multi-family unit counts</li> <li>• Legal Class</li> </ul>
<p>33) Valuation methods</p>	<p>Valuation methodologies must be maintained.</p>	<p>If a parcel is valued on the Income Approach in 6i, then that parcel should still be valued on income approach in the System post conversion.</p>
<p><b>Appeals</b></p>		
<p>34) General scope  (Need to be tested on prior year)</p>	<p>Must maintain historical record of data associated SBOE appeals (six years)</p> <p>Examples of the type of data to be converted include but are not limited to those items shown at the right.</p> <p>There is also a number of scanned documents that include petitions and evidence.</p>	<ul style="list-style-type: none"> <li>• Petition number</li> <li>• Parcel number</li> <li>• status</li> <li>• Owner information including representative</li> <li>• Date petition received</li> <li>• Tax payer comments</li> <li>• SBOE dates, outcomes</li> <li>• Assessor Recommendation</li> <li>• Board Decision</li> <li>• Final Comments</li> <li>• Noticed value</li> <li>• Assessor’s recommended values</li> <li>• Decision Values</li> </ul>

Category	Criteria	Examples
<b>Sales/Deed History</b>		
35) General scope	<p>Must maintain historical record of sales and data associated with sales.</p> <p>Examples of the type of data to be converted include but are not limited to those items shown at the right.</p>	<ul style="list-style-type: none"> <li>• Seller of record</li> <li>• Owner of record</li> <li>• Sale/Deed date</li> <li>• Sale price</li> <li>• Deed type</li> <li>• Deed number</li> <li>• Recording number</li> <li>• Parcel acres</li> <li>• Property use codes</li> <li>• Sale validation codes</li> <li>• Full cash values at time of sale</li> <li>• Ratios</li> </ul>
<b>Personal Property</b>		
36) Total value for certified tax year (FCV and AV)	Value must be within 0.006% of one another	Prior FCV = \$1,110,000,000 After FCV= \$1,110,000,000 Prior AV = \$1,110,000,000 After AV= \$1,110,000,000
37) Total value for certified tax year by tax Code area	Value must be within 0.006% of one another	Prior FCV 924010 = \$247,000,000 After FCV 924010 = \$247,000,000
38) Total value for current tax year	Value must be within 0.006% of one another	Prior FCV = \$1,110,000,000 After FCV = \$1,110,001,000
39) Total value for current tax year by tax code area	Value must be within 0.006% of one another	Prior FCV 924010= \$247,000,000 After FCV 924010= \$247,000,000
40) Total number of accounts for current tax year, broken down by active and deleted	Count must be within 0.006% of one another	Prior active = 9,000 Prior deleted = 4,500 After active = 9,000 After deleted = 4,500
41) Total Number of accounts for the current tax year that have a late filing penalty	Count must be an exact match of accounts with a late filing penalty	Prior accounts with penalty After accounts with penalty

Category	Criteria	Examples
42) Account level accuracy requirements (current year)	It is the County’s intent that all valid legacy data at the <b>account detail level</b> be converted into the System. Account data prior to conversion should be an exact match to account data after conversion. Examples of the type of data to be converted include but are not limited to those items shown at the right. Valid legacy data is defined as those items identified in the data migration plan to be converted.	<ul style="list-style-type: none"> <li>• Total number of detail lines</li> <li>• Detail lines by year acquired</li> <li>• Total cost per line item and by account</li> <li>• Calculated value per detail line</li> <li>• Maintain to link leaser to lessee</li> <li>• Depreciation type</li> <li>• Business type code</li> </ul>
<b>Special Assessments</b>		
43) Total number of parcels under Statutory Classification by type	Count must be an exact match by type	Prior CU = 6,100 After CU = 6,100
44) Total acres of land under Statutory Classification by acres	Acres must be an exact match by type	Prior = 250 ac After = 250 ac
45) Certified year total value by value type (FCV, NAV of land under Statutory Classification	Value must be an exact match by type and value type	Prior FCV STF = 80,000,000 After FCV STF = 80,000,000
46) Total number of Special assessment districts	Count must be an exact match of both districts and parcel counts	Prior = 3,500 After = 3,500
47) Total number of Special assessment district acres	Acres must be an exact match	Prior = 3,500 After = 3,500
48) Parcel level accuracy requirements	It is the County’s intent that all valid legacy data at the <b>parcel detail level</b> be converted into the System. Parcel data prior to conversion should be an exact match to parcel data after conversion. Examples of the type of data to be converted include but are not limited to those items shown at the right. Valid legacy data is defined as those items identified in the data migration plan to be converted.	<ul style="list-style-type: none"> <li>• Soil type per Acre</li> <li>• Total FCV by Soil/Site type</li> <li>• Special Use value by Soil/Site Type</li> <li>• Effective Size</li> <li>• Description of Soil/Site type</li> </ul>
<b>Tax Roll</b>		
49) District certifications Counts, rates, values, and taxes	The values for roll extension and certification will match the “Certified Tax Roll” once converted into the System.	
50) Code Districts		All
51) Tax Roll Data		Within 1 dollar by district
51.2) Special Assessment codes	Count of Special Assessment codes matches.	350 before = 350 after
51.3) Total Special Assessment Imposed assessments	Total value of Special Assessment matches.	\$490,481.54 before = \$490,481.54 after

<b>Category</b>	<b>Criteria</b>	<b>Examples</b>
51.4) District level accuracy	Detail of District codes matches.	Description, contact information, DOR code, tax rate, distribution %, code areas, etc.
51.5) Code Areas	Total count of code area combination matches.	015060 = 20 parcels before equals 015060 =20 parcels after
51.6) Code Area level accuracy	Detail of Code Area matches.	Description, DOR code, tax rates, distribution %, code areas, etc.
51.7) SVP frozen and Market Values	Total values by SVP agencies matches.	SVP Phoenix = \$350,000 before equals Market Phoenix = \$350,000 after
51.8) Joint County value by Districts	Total value by Districts matches.	Phoenix =\$25,000 before equals Phoenix =\$25,000 after
51.9) Total Assessed Value (AV), exemptions and Net Assessed Value (NAV)	Grand total of AV, exemptions and NAV	NAV before = \$2,890,008 NAV after = \$2,890,008
51.10) Total NAV for Real properties, Personal Properties, and Utility accounts.	Total assessed value for Real properties, Personal Properties, and Utility accounts.	NAV Real properties before =\$1,000 NAV Real properties after = \$1,000

**B: REPORT ASSUMPTION**

The reports listed below represent the major reports required by Statute in Arizona and shall be operational, producing complete and accurate results, at Go-Live, as well as a sampling of reports currently used by the County. Many other reports will be required and evaluated for action as part of the Development Track report planning workshop. The County plans to eliminate or consolidate reports by leveraging as many out-of-the-box reports as possible.

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Remote Municipal Property	Annual	42-15252		Contains a listing of exempt municipal properties located within Maricopa County. Used to report the properties owned by municipalities outside the county per ARS 42-15252. The county assessor shall determine the full cash value and primary and secondary assessed valuation of remote municipal property at the same amount and using the same method of assessment as applied to private property that is used for the same purpose in the county.
Levy Limit Report	Annual	42-17052	Yes	Contains the Current Net Assessed Value and Property Subject to Taxation in the Prior Year used to calculate the amount of new construction by taxing jurisdiction. Determine the assessed value for the current tax year of all property in the political subdivision that was subject to tax in the preceding tax year.
State Abstract	Multiple	42-15155	Yes	Contains an aggregate summation of valuations by taxing jurisdictions. It contains all property and must create a Net Assessed Value but subtracting properties which are determined to be exempt per ARS 42-15155 and must be in a format determined by the Department of Revenue.
GPLET Report	Annual	42-13051		(Government Property Lease Excise Tax) – Contains the properties reported to the Assessor which are determined to be subject to an excise tax and leased to a private entity per ARS 42-13051 & 46-6406. List the property with the determined valuation for use on the tax roll and report to the department of education the determined valuations of properties that are subject to the government property lease excise
Annexation Reports	On-Demand	48-261	Yes	Contains a list of parcels within a proposed annexation area based on a supplied boundary per ARS 48-261. The detailed list of taxed properties provided by the assessor.

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Exception List	Annual	42-13053		Contains a list of parcels which the value has changed more than 15% from the preceding year per ARS 42-15053. If the county assessor initially determines the valuation of property under this article by using a computerized data processing or valuation program, and if the valuation found by that method constitutes a change in the valuation methodology and the resulting change in valuation in any year is more than fifteen per cent above or below the valuation found for the same parcel of property in the preceding year, the assessor shall place the parcel on an exception list.
Non-Appraised List	Annual	42-13003		Contains a listing of parcels in which the value has not changed in the previous 3 years per ARS 42-13003. The county assessor shall report to the department each parcel of property that has not been appraised during the preceding three years.
Split Control Routing History				SP11009.RDF
Proposed Property Records				SP11010.RDF
View Proposed Property Information				SP11015.RDF
Splits Processed by Department				SP11020.RDF
Split Control File				SP11045.RDF
Split Values Report				SP11046.RDF
Market-Deed Data Report				SP11060.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Splits Proposed Property				SP11070.RDF
Splits Tracking Report				SP11082.RDF
Tax Area Summary				SP12080.RDF
Revision Block Inquiry Report				SP13005.RDF
Field Review Inquiry				SP21005.RDF
Field Review Inquiry Summary				SP21006.RDF
Appraisal Tracking Report				SP21012a.RDF
Residential Property Components				SP21020.RDF
Scanned Audit Report				SP21021.RDF
Property Components and Details				SP21023.RDF
Report of Vacant Parcels by Subdivision				SP21032.RDF
Report of Parcel Values by Subdivision				SP21033.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Report of Parcel Situs Addresses by Subdivision				SP21034.RDF
Cost Detail Report				SP21040A.RDF
Cost Summary Report				SP21040B.RDF
Full Cash Value Summary				SP21040C.RDF
Cost Improvement Detail				SP21041A.RDF
Cost Summary – Prior				SP21041B.RDF
Cost Summary – Current				SP21041C.RDF
Cost Improvement Detail – Current				SP21041D.RDF
M&S Temp Cost Detail Report				SP21042A.RDF
M&S Temp Cost Summary Report				SP21042B.RDF
Historic Detailed Valuation Report				SP21044A.RDF
Cost Query File				SP21047.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Cost Query Report				SP21048.RDF
Cost Delete Activity Report				SP21049.RDF
Prior Years Cost Data				SP21050.RDF
Prior Years Cost Data Summary Report				SP21051.RDF
Vacant-Land Modeling				SP21066.RDF
View Prior Land Components				SP21068.RDF
AG Applications				SP21070.RDF
AG Components				SP21075.RDF
Residential Comparable Sales				SP21080.RDF
Residential Property Analysis Worksheet				SP21200.RDF
Residential Property Analysis Worksheet Sept. Appeals				SP21205.RDF
Agriculture Valuation Expired Lease Report				SP21265.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Agricultural Land Use Report				SP21270.RDF
Agricultural Mix Status Report				SP21275.RDF
Agricultural District Report				SP21280.RDF
Agricultural Valuation Lease Update				SP21285.RDF
Pending AG Applications				SP21290.RDF
Agricultural Valuation Report by District				SP21295.RDF
Prior Year Associated Parcel Report				SP21311.RDF
Commercial Property Value Analysis				SP21360.RDF
Income/Expense Analysis Worksheet				SP21365.RDF
Comparable Commercial Sales (Good Sales)				SP21370.RDF
Comparable Sales (Rejected Sales)				SP21371.RDF
Associated Parcel List				SP21375.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Cost Analysis Report				SP21380.RDF
Sales Affidavit Report				SP21385.RDF
Cost Detail Parcel Report				SP22080.RDF
Cost – Detail Improvement Report				SP22055.RDF
Cost Summary Parcel Report				SP22065.RDF
Property Valuation Notice				SP23070.RDF
Property Valuation Notices for AG				SP23070A.RDF
Property Valuation Notices for Class 3				SP23070B.RDF
Property Valuation Notices for Other				SP23070C.RDF
Property Valuation Notices for Senior Protection				SP23070D.RDF
Property Valuation Notices for Golf				SP23070E.RDF
Notice of Change of Value				SP23072.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Notice of Change – AG				SP23072A.RDF
Notice of Change – Class 3				S23072B.RDF
Notice of Change – Other				SP23072C.RDF
Notice of Change – Senior				SP23072D.RDF
Notice of Change for Golf				SP23072E.RDF
Residential Variance Detail Report				SP23080.RDF
Assessor Level Appeal Tracking Report				SP24015.RDF
Assessor Level Meeting Schedule Report				SP24021.RDF
Analysis – Appeal – Internet/Bulk				SP24041.RDF
Analysis – Appeal – Internet/Bulk Summary				SP24041A.RDF
Appeal Decision Calculator Report				SP24115.RDF
Appeals Decision Calculator SBOE				SP24115S.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Appeal Document Link				SP24500.RDF
Outstanding Permits				SP24910.RDF
Hand Resolution Report				SP25020.RDF
Pending Resolutions Approved by Supervisor				SP25045.RDF
Litigation Case Worksheet				SP27005.RDF
High Value Open Cases				SP27006.RDF
Litigation Remarks Report				SP27007.RDF
Agree to Settle Report				SP27010.RDF
Agree to Dismiss				SP27015.RDF
Office Assignment Report				SP27020.RDF
Opened Cases Assigned				SP27025.RDF
Trial/Pre-Trial/Oral Argument Report				SP27030.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Submitted Recommendations Report				SP27035.RDF
Needs RESOs				SP27040.RDF
Needs TASRs				SP27055.RDF
TASR Report				SP27060.RDF
TASR Cover Sheet Report				SP27065.RDF
Multiple Parcel Tax Appeal Settlement Recommendation				SP27070.RDF
AZ Residential Rental Property Information				SP28010.RDF
Ownership Update Screen				SP31010.RDF
Report of Ownership Changes				SP31010A.RDF
Weekly Transfer Report				SP31015.RDF
Deed Status Report				SP31016.RDF
Open Deeds Summary				SP31017.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Consolidate Ownership Preliminary Report				SP31030.RDF
Title/Conto Chain Report				SP31040.RDF
First Notice of Intent to Reclassify Rd Property				SP31045.RDF
Final Notice of Intent to Reclassify Rd Property				SP31046.RDF
Owner Occupied Verification Report				SP31047.RDF
Notification of Classification Change				SP31048.RDF
Market Data Parcel Report				SP31060.RDF
Printed Sales Affidavits				SP31090.RDF
Organizational Exemption Report				SP32025.RDF
Common Area Parcel Maintenance Screen Print				SP33005.RDF
DIMS Parcel History Report				SP50010.RDF
DIMS Parcel History Report by Range				SP50011.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
DIMS Subdivision Maintenance				SP50020.RDF
Residential Subdivision Information Report				SP50025A.RDF
Residential Subdivision Activity Report				SP50025B.RDF
Residential Subdivision Models Report				SP50025C.RDF
Residential Subdivision Models Usage Report				SP50025D.RDF
Residential Subdivision Pending Visits Report				SP50025E.RDF
Residential Subdivision Overdue Visits Report				SP50025F.RDF
Residential Subdivision Active Subdivision Report				SP50025G.RDF
DIMS – Parcel Records				SP50030.RDF
Appraiser Daily Report				SP50050.RDF
Assessor Daily Report				SP50060.RDF
Assessor Daily Detail Report				SP50070.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Assessor Daily Summary Report				SP50071.RDF
TAR Report				SP97010.RDF
TAR Detail				SP97015.RDF
User Report				SP97120.RDF
Role – Form Report				SP97200.RDF
User - Role – Forms Report				SP97210.RDF
Role User Report				SP97220.RDF
Forms – Roles Report				SP97230.RDF
Appraiser Daily Reference Report				SP98395.RDF
Screen Print of Sketch				SP99000.RDF
View Secured Property Info. Print				SP99005.RDF
County of Maricopa Parcel Search Report				SP99010.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
STAR Center Report				SP99020.RDF
LPV Calculation Report				SP99025.RDF
LPV Calculation Report, Prior Year				SP99025_A.RDF
Update Property Legal Description Report				SP99035.RDF
Residential Property Components				SP99040.RDF
Current Year Value History Report				SP99050.RDF
Name & Address Inquiry Report				SP99055.RDF
Prior Years Value Information Screen Print				SP99070.RDF
Value History Report				SP99071.RDF
Legal Class 3 to 4 Summary Report				SP99205.RDF
Operations Batch Control Report				SP99315.RDF
Parcel Audit Report				SP99405.RDF

REPORT TITLE	FREQUENCY	STATUTE	FORMATTED?	DESCRIPTION
Resolution for Notice of Errors				SPBS015.RDF
Open Notices of Claim				SPBS030.RDF
Screen Print for Secured Open Notice of Claims				SPBS031.RDF
Screen Print for Unsecured Open Notice of Claims				SPBS032.RDF

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## **C :INTEGRATION ASSUMPTIONS**

The following integration points shall be considered the starting assumption for the Development Track data integrations. The method of integration, frequency, data types, etc., may change as analysis progresses and the final Development Plan is approved.

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### **1. COMPLETE INTEGRATION**

The following software products require complete, “seamless” integration—i.e., the integration should function as a single unit and part of the System, and not require periodic (even frequent) data transfers or transformations. The end-user should experience the use of the integrated component as if he/she were in the primary software application.

Use Cases and specifications shall be developed as part of the Development Track.

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### **2. GIS/Pictometry Aerial and Streetfront Imagery**

The System shall have ability to view all geospatial data, as contained in the County Assessor’s enterprise ESRI GIS and Pictometry imagery, using the parcel or improvement context provided by the system. No additional querying of the GIS or imagery is required. Basic geospatial viewing functionality shall be available to the user: pan, zoom, use of identify feature, full use of various oblique imagery, angles , etc.

No data exchange will take place, only utilization of GIS & image functionality as part of the System will occur.

Example: When the user is viewing property components of a given improvement, the user can cause the parcel (GIS) to be visible on demand or the GIS/image is queried and presented automatically when context is achieved in the system.

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### **3. Apex Sketch Pro**

The System shall have the ability, in the office or field, to use the Apex drawing client to draw improvement boundaries and make notes to sketch areas and save the sketches and update the appropriate data fields in the system. Data such as total square feet are updated in the system from Apex.

The sketch shall be visible without user action on all primary property improvement characteristic screens.

Data will flow from Apex to the system.

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### **4. Marshall & Swift Cost Tables**

The System shall utilize the residential and commercial cost tables and updates provided by Marshall & Swift to complete any valuation where the cost method is used. No additional action by the user shall be required to cause the Solution to function properly and complete the valuation.

The Marshall & Swift Segregated Cost engine utilized by the Assessor’s Office is specific to the County. It comprises a set of SQL Server tables which are installed on a local server and which contain all the components and their data for Arizona. We also receive a Cost Calculation Engine that is installed on the same server as the SQL Server database. For commercial property valuation, the County utilizes the segregated cost system - not a square foot cost system like many other jurisdictions. The County passes all cost valuation requests to this engine which calculates the appropriate values and passes these values back to us. The County does not have the ability to see inside the engine, or to see what the valuation information is without making a valuation request of the engine itself.

We pass this calculation engine an .xml file in the format and with the data designated by Marshall & Swift. This .xml file is read by the calculation engine which calculates the appropriate values and returns to the County an .xml file with the valuation information. We then take this file and convert it into data we can then insert into our current system.

On an annual basis, the County is required to provide Marshall & Swift the cost information on the statutory AZ components along with any new components we have added. The engine will incorporate these updates before sending to the County. Once a year the County receives the new cost data and calculation engine. The County passes the information for all of our cost properties to the engine and takes the results and inserts them into PAIS.

On a daily basis, users can make single parcel valuation requests of the calculation engine and see updated valuation information.

**5. Assessment Analyst**

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Esri Canada’s Assessment Analyst shall serve functionally as an alternate user interface to the Vision database and Apex sketch files, though AA’s own database may serve as an intermediary depending on technical considerations for the data life cycle between AA and Vision. Property component changes made through AA will be stored and retrieved within Vision with real-time integration.

**6. MS Exchange Server/Outlook**

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The System shall automatically send emails, where configuration allows, to either stored email addresses or to an ad hoc address entered by the user.

Data will flow from the System to the integration point.

Example: A workflow approval is required by a senior manager and configuration has been accomplished with the manager’s email address incorporated—the email with prepared text is automatically sent to the manager’s inbox indicating the action to be taken.

**7. EXTERNAL DATA INTEGRATIONS**

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The following software products require integration, but they do not need to behave as if the software and the System are a single unit. Operation may occur to allow interactivity.

**8. SPSS**

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The System shall allow SPSS to perform all statistical calculation and regression analysis in support of the creation of all valuation models.

Data will flow both directions: sales and property characteristics will flow to SPSS, and the model syntax will be made available in the System.

As of this writing, the Project Team will select one of these candidate strategies for implementing the syntax file exchange.

<b>Option ID</b>	<b>Description</b>
A	Use native SPSS & hand-code Python (in Iron Python, an implementation for .NET)
B	Use Python within SPSS, which should transform smoothly to Vision
C	Generate PMML from SPSS & hand-code operators unsupported in code generator
D	Use native SPSS & hand-code PMML
F	Stop using SPSS & move to R
G	A third-party parser

**9. OnBase: Electronic Document Management Solution**

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The System shall have the ability to operate the Assessor’s current document management software from the Solution, with the ability to set indices and classifications per the OnBase configuration. OnBase integration points are undetermined at this point and the scope of this integration is greatly dependent upon future business decisions. It is expected that context data will flow to OnBase for use in obtaining or storing the associated document.

## 10. ROUTINE IMPORTS & EXPORTS

### Treasurer Data Exchange

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Almost exclusively, the transfer of data between the Assessor and the County Treasurer is file-based. This means either the Assessor or the Treasurer extracts data from the appropriate system and makes that file available to the other for consumption. The following represent the main transfers, but additional may be identified in the Development Track.

1. **Resolutions.** Assessor enters resolutions in their system and prepares the files. These are picked up by the Treasurer. They then process the resolutions through their system. Treasurer then provides result files for the Assessor to pick up.
2. **Address changes.** Each week the Assessor creates a file of all address changes from our system and makes that file available to the Treasurer to update their system.
3. **Tax Roll.** Each year in August the Assessor makes the tax roll available to the Treasurer. This file contains the data for all parcels and personal property accounts and is the basis for the Treasurer to calculate and generate tax bills.
4. **Tax Files.** Each year after tax bills are generated the Treasurer creates a tax file that contains the tax information for all properties. The Assessor uses this data for research and projection.
5. **Senior Value Protection.** Each year the Assessor provides the Treasurer a file of all parcels whose owner has qualified for valuation protection according to statute. The Treasurer uses this information to apply an elderly assistance credit to each homeowner.

### Recorder Import

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The System shall be able to import County Recorder's Office data representing parcel and record maintenance recordings. Volume is 1500 – 2000 records received on a daily basis. Data elements received include, but are not limited to, the following:

- Recording Number
- File date
- Date Transferred
- Parcel Number
- File Type (Splits/Combines, Deeds, Affidavits, Judgments, Plat Maps, etc.)

### Building Permits

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The System shall be able to import permit data as submitted by external agencies. Volume varies based on agencies. The process is performed in batch on a weekly basis and includes, but is not limited to, the following data elements:

- Parcel
- Owner
- Situs
- Builder
- Permit Status
- Type (new construction, additions, demos, etc.)
- Issue Date
- Job Descriptions
- Census Code

### **FTP Exports**

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With varying frequency, the Assessor's Office makes available to other jurisdictions a series of datasets residing on an FTP server.

### **Website Database**

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Currently, on a nightly basis the County's website database, hosted in MySQL, loads an update from a separate instance of our core system. The dataset is indexed for the use of our custom search engine. The website's MySQL database also contains registries for Rental Registration, Personal Property renditions, and the like. These registries are reviewed periodically and then imported into PAIS

Whether through a similar data extract into a separate database or the use of APIs, the website requires reasonably current data and the ability to accept data and files from the public. The County is interested in a new solution which removes several current steps in the data life cycle and thus reduces replication and latency for either the public or the County.

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**D - NEW FUNCTIONALITY**

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The following areas of System functional improvement shall be considered the starting assumption for the Development Track. One or more detailed Use Cases shall be prepared for each area, but the starting assumption is shown below and reflects the response by Vision to the competitive gap process.

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**SEGREGATED COST**

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The CAMA software application shall utilize the commercial cost tables and updates provided by Marshall & Swift to complete any valuation where the cost method is used. No additional action by the user shall be required to cause the Solution to function properly and complete the valuation.

The Marshall & Swift Segregated Cost engine utilized by the Assessor's Office is specific to Maricopa County. Maricopa County passes all cost valuation requests to this engine via web services, which calculates the appropriate values and returns these values to the current system. On an annual basis, component data for all cost properties is sent to the engine and the resulting valuation information is loaded into the current system. On a daily basis, users can make single parcel valuation requests of the calculation engine and see updated valuation information.

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**CASE MANAGEMENT**

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Currently, the CAMA software application does not have a Case Management module. The County is looking for a very large and complex module that can handle tasks ranging from small to very large appeals that may flow through different hearing venues. The module requires extensive mailing capabilities and interfaces to other systems such as GIS, email, document management, the County Treasurer's system and other State agencies. The module will also need to interact with the CAMA software market comparables module. The requirements defined by the County will result in significant custom programming development.

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**ASSESSED VALUE CALCULATION**

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The CAMA software application has a flexible valuation model but it doesn't currently have the ability to change assessment percentages based on laws from neighboring counties, the State, as well as the County. A myriad of business rules will need to be created that rely on the property use and legislation classification of the property to come up with a final assessed value. Some contain a percentage which needs to be applied to the final assessed valuation. The associated parcel functionality is also part of determining the final assessed value as the County calculates a total value and will allocate to parcels contained in the economic unit. In the Marshall and Swift engine, the County has statutory appraised data for both Golf and AG properties which need to be contained in the system to conform to business practices. Also the County requires valuation as subdivisions are being created and the new System must conform to the business rules, i.e. the county has an initial, interim and final land full cash value for new subdivisions which changes as the infrastructure is developed. Custom development related to assessed value calculation impacts the following:

- Legal classes and assessments
- Economic units
- PUC valuations
- Subdivision valuation
- Mixed use properties
- Statutory appraised properties

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**WORKFLOW**

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The CAMA software application currently has a workflow process management and configuration toolset in design. This development has already started in conjunction with other projects and has also accounted for ongoing development, support and enhancements beyond that time frame. The solution will include transparent application integration having simple and flexible configuration which will be able to handle multilevel workflow processes. Security will be flexible enough to manage and authorize hierarchical application users as well as mapping to

external authentication systems such as Active Directory. As business processes are managed through workflow, reporting and queues will enable system users (management and individuals) to have a clear view of what is needed and what is in action. The design of workflow will include the ability to automate steps which get performed in the application as well as build complex business processes which may have external integration steps. This will all be facilitated through the CAMA software application in a flexible, repeatable, user friendly manner. Items such as case management, building permits and appeals are examples of processes that will be configurable through workflow and may have configurable dependencies. Workflow will be flexible enough to handle other processes which are required. The intention is that the administrator users will be able to create and configure workflow processes without intervention. These configurations can be unique to the County's business processes.

#### **REGRESSION MODELING**

The System shall allow SPSS to perform all statistical calculation and regression analysis in support of the creation of all valuation models. These various models will be developed solely within SPSS. ( See Appendix 3.C.8 for options available to the project team.

**E - MILESTONE/DELIVERABLE ACCEPTANCE FORM**

The information for Deliverable Acceptance shall be filled out by Vision and presented to the County for approval after all deliverables for a given milestone have been completed. Alternately, this form can be used to document the acceptance of one or more deliverables that may not result in immediate payment. The County will then sign the form, and return it to Vision for signature. Vision signs the form, and returns one copy to the County.

<b>Milestones/Deliverables Name &amp; Number:</b> (If only a milestone is listed, it is assumed all deliverables within the milestone are accepted)		
<b>Date Completed:</b>		
<b>Notes/Exceptions/Variations:</b>		
Vision Attest		
NAME	TITLE	DATE
Maricopa County Acceptance		
NAME	TITLE	DATE

**F - NO COST SCOPE CHANGE FORM**

This form shall be used to document any material change to the SOW that results in either more or less delivery from Vision, in terms of quantity or quality, from that defined in the SOW.

This form shall be filled out by Vision and presented to the County for approval. The County will then sign the form, and return it to Vision for signature. Vision signs the form, and returns one copy to the County.

Task (s) to be changed	
Effective Date	
New language or Change:	
Vision Activities	
County Activities	
Vision Deliverables	
County Deliverables	
Acceptance Criteria for Vision Deliverables	
Reason for Change/Notes:	
<b><i>Vision, Inc. Agreement – Signature/Title/Date:</i></b>	
_____	
Name	Title
	Date
<b><i>Maricopa County Agreement – Signature/Title/Date:</i></b>	
_____	
County Executive PM	Title
	Date
<b><i>Maricopa County Agreement – Signature/Title/Date:</i></b>	
_____	
Chief Procurement Officer	Title
	Date

**G – FORMAL CHANGE ORDER REQUEST**

This form shall be used to document any material change to the SOW that results in a formal change order as defined in section 1.3 of Exhibit A, Part 1.

This form shall be filled out by Vision and presented to the County for approval. The County will then sign the form, and return it to Vision for signature. Vision signs the form, and returns one copy to the County.

Task (s) to be changed	
Effective Date	
Current language (referenced by section):	
New language or Change:	
Vision Activities	
County Activities	
Vision Deliverables	
County Deliverables	
Acceptance Criteria for Vision Deliverables	
Reason for Change/Notes:	
Estimated Cost	
<b><i>Vision, Inc. Agreement – Signature/Title/Date:</i></b>	
_____	_____
Name	Title
_____	_____
	Date
<b><i>Maricopa County Agreement – Signature/Title/Date:</i></b>	
_____	_____
County Executive PM	Title
_____	_____
	Date
<b><i>Maricopa County Agreement – Signature/Title/Date:</i></b>	
_____	_____
Chief Procurement Officer	Title
_____	_____
	Date

**VISION GOVERNMENT SOLUTIONS, 44 BEARFOOT ROAD 2<sup>ND</sup> FLOOR, NORTHBOROUGH, MA  
01532**

PRICING SHEET: NIGP CODE 20882

Terms:	NET 30
Vendor Number:	2011005524 0
Certificates of Insurance	Required
Contract Period:	To cover the period ending <b>December 31, 2024.</b>