

REQUEST FOR QUALIFICATIONS FOR
Special Assessments Management Software and Maintenance /
Support

City of Bismarck

Finance Department

REQUEST FOR QUALIFICATIONS

The City of Bismarck Finance Department requests written qualifications for the purchase of Special Assessment Management Software (hereafter referred to as “SAM”), including software user licenses, if necessary, and maintenance / support. The software will include the selection and acquisition of software, implementation services, training, and support and maintenance costs to implement the software.

The selection process will be completed in accordance with established City of Bismarck procedures. Written qualifications shall address the vendor’s ability to meet the scope of services in a timely manner. Written qualifications shall address all items contained within the scope. The primary consideration items will be, but not limited to, the vendor’s:

1. Technical capabilities
2. Experience and performance records (supply references, please)
3. Understanding of project and proposed work approach
4. Knowledge of special assessments, database management systems, and application development
5. Ability to respond in a timely manner
6. Interview with key personnel and/or demonstration of product
7. Time schedule and implementation price / costs

The selection of vendor will be based on an evaluation of the written qualifications. A selection committee may interview selected vendors. An agreement, including price schedule, will be negotiated with the selected vendor for approval by the Board of City Commissioners.

Inquiries should be directed to City of Bismarck Finance Department (701-355-1601) or dchernyak@bismarcknd.gov.

Written proposals from qualified consultants will be accepted until 5:00 p.m. CST on Friday, September 23rd, 2022.

Submit nine (9) copies of the proposal, plus one digital copy, to:

Dmitriy Chernyak
Finance Director
City of Bismarck
221 North 5th Street
P.O. Box 5503
Bismarck, ND 58506-5503

Telephone (701) 355-1601
Email: dchernyak@bismarcknd.gov

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Dated this 26th day of July 2022.

Subject: Special Assessments Management Software Scope:

The City of Bismarck is seeking to implement a special assessment software for the City's Finance Department. The total project will include the selection and acquisition of software, implementation services, training, and support and maintenance costs to implement the special assessment management software and integrations within other applications used throughout the City, including Tyler New World, the City's ERP system. The City is allowed by State of North Dakota statutes to special assess for infrastructure within the City for maintenance, new construction, streetlights, watermains, sewer mains, sidewalks, and other types of infrastructure that benefit citizens. Currently, the City utilizes a custom-built AS400 system that contains all the special assessment information by property. The AS400 system is obsolete and very limited in its functionality. AS400 does not integrate with Tyler New World ERP system.

The contract term desired is for the initial implementation and system maintenance and support for a period of five (5) years, with an option to renew for an additional three to five (3-5) year maintenance and support period.

The Minimum Technical Requirements, Interfaces, and Implementation and Configurability requirements are listed below. The Minimum Technical Requirements portion lists the mandatory functions that must be able to be implemented. The implementation and configurability portion lists additional capabilities the vendor should provide as services to the City under an agreement.

The City intends to seek the best solution, based on the representative criteria contained in this RFQ for its special assessment management needs. The successful vendor(s) will seek to satisfy the specifications contained in this RFQ, bringing to bear whatever vendor resources are required from the areas of software, technical training, conversion, maintenance, and services support.

The City requests that responding vendors propose the following applications and services:

- Special assessments management software that provides database management, tracking, payment processing, and historical functionality
- User-friendly, responsive, intuitive, easy-to-use interface for staff and customers
- Application, technical, and administration training
- Ongoing 24/7 support and maintenance

The City desires to contract with a single vendor for all software and software maintenance, installation, conversion, and support with recommended hardware requirements specified in proposal. However, the City reserves the right to evaluate each software application module on its own standard of performance, regardless of whether other or remaining application modules of the vendor are considered by the City. The City reserves the right to award the system to any one vendor or a combination of vendors.

A. MINIMUM TECHNICAL REQUIREMENTS: The special assessments management software shall provide at least the following functions:

1. Special Assessment Management: a system for managing special assessment information and amounts and define various types of users with varying levels of security and access
2. Payment Processing:
 - a. Ability to receive payments from citizens or staff when payments are made
 - b. Ability to properly calculate interest on outstanding special assessments
 - c. Ability to provide ease of use for staff for processing customer payments
 - d. Ability to interface with Tyler New World
 - e. Ability to provide receipts for customers
 - f. Ability to interface with City's website as payments are made and received
 - g. Ability to integrate with a variety of payment processing vendors
 - h. Transactions must be able to have live updates or as soon as possible as payment transactions occur
3. Database / Data Management:
 - a. Ability to input and track data by the following fields/types: special assessment district, special assessment district type, parcel number, street address, owner name, and legal description, original assessment amount, term, interest rate, principal amount due, interest amount due, payment schedule, and principal balance due
 - b. Ability to run reports that show outstanding balances, payments made, additional special assessments by different data fields as noted in 3a above
 - c. Ability to split lots and make changes for secured personnel
 - d. Ease-of-use forms for office staff to enter payment information
 - e. Ability to convert existing data from AS400 into new system
 - f. Ability to provide a means of alerting user of duplicate names, address, businesses etc. at data entry and have the ability to merge duplicate records as needed
 - g. Ability to create mandatory fields on data entry screens, which are customizable
 - h. Ability to calculate interest and fees based on percentages assigned or customized amount
 - i. Ability to edit existing special assessments / parcels / districts for allowed personnel and ability to recalculate fees and interest charges in the future based on these changes
4. Audit Trail and Data Storage:
 - a. Ability to track changes and provide audit trail
 - b. Ability to maintain records from the start of implementation of new software
 - c. Ability to maintain records of amounts, dates, parcel records, etc. of original special assessments, existing special assessments, previous special assessments, amounts owed at certain periods of time, and payments made by customers at specific period of time by fields noted in 3a.
 - d. Ability to maintain fully paid special assessments and the date they were paid by various fields noted in 3a.
5. Reporting and Presentation:

- a. Ability to query and run customized reports based on various data fields noted in 3a in PDF, CSV, and Excel formats
 - b. Ability to provide customizable summary dashboard(s) in a concise and interactive manner
 - c. Ability to share dashboards / summary data on City's website to inform customers / citizens of outstanding special assessments by parcel or property address
 - d. Ability to support multiple sessions within the same browser
 - e. Ability to export data in various formats to submit to external entities
6. System Management:
- a. Ability to store data through services either on a server or hosted (cloud) environment
 - b. Ability to update software as needed
 - c. Ability to integrate with Tyler New World and City's website
 - d. Ability to run on a virtualized environment
7. Access and Security:
- a. Ability to share content and control access with individuals, groups, or general public on City's website
 - b. Ability to create dashboards for monitoring progress and results in the form of interactive charts and graphs for visual aid
 - c. Ability to lock sensitive fields based on user permissions
 - d. Ability to allow only one user at a time to update a file/record, however allowing others to view the file/record while it is being updated

OPTIONAL CAPABILITIES:

- Ability for drop down lists on fields where applicable.
- Ability to access and utilize management system remotely on mobile or other wireless device at any location. Users may have the ability to work "off-line" not only read files but update and complete tasks anywhere with internet access
- Ability to validate data and prompt used to complete any required fields not completed at the save point while retaining data entered prior
- Customized interfaces / dashboards

B. INTERFACES: The Special Assessments Management software shall provide at least the following functions relating to other systems interfaces:

- Ability to interface with Microsoft Office products
- Ability to interface with Microsoft SQL database management systems
- Ability to interface with Microsoft Azure for single-sign on by users
- Ability to interface with Tyler New World
- Ability to interface with City's website
- Ability to interface with CAMA / ESRI for address and parcel data

C. IMPLEMENTATION & CONFIGURABILITY: The City of Bismarck employs dedicated IT staff to support data management, dissemination, and

implementation of solutions to City staff that manage special assessments. The selected vendor will need to provide comprehensive software licenses and maintenance support to the City to meet the minimum requirements listed above. Please submit a narrative describing the following additional capabilities:

- System must contain easily configurable solutions to support a broad range of local government workflows
 - Established best practices suited for municipalities across the United States
 - Number of local government customers using your software within the United States
- System capable of providing both enterprise-wide concurrent licensing and individual single-use licenses, as needed
- Both on-premise or software as a service (SaaS) environment options available to be deployed
- Ability to provide individual user-based identity across the system
- Training available online

The Vendor should provide the following Support Information:

Support Options

- Does the Vendor provide Online Support?
- Other options for support?
- How many support staff does the vendor employ?

Support Goals

Please provide Response Times and Resolution Times to the following incident levels

- Emergency
- Critical
- Standard Help Call
- Problem Escalation Procedures
- How are incidents handled?
- What tools do the Vendor Support Staff use?

Maintenance & Enhancement Updates

- How are updates managed?
- How often are updates released?
- What is the typical downtime during an update?

Describe the following requirements of the proposed system:

Server Details

- Operating System
- Processor(s)
- Memory
- Required Disk Space
- Workstation Requirements

FORM OF PROPOSAL

All proposers shall be aware that the RFQ and the responses thereto are in the public domain and become the property of the City. After the evaluation process is completed and an award decision is made, the Proposals will be available under State of North Dakota open records law. Blanket statements that entire submittals are confidential shall be unacceptable. All proposals will become the exclusive property of the City and will not be returned.

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the proposer's ability to fulfill the requirements of the Request for Qualifications. In order to ensure a uniform review process and to obtain the maximum degree of comparability, it is required that qualifications be organized to affirm the minimum items, provide availability of optional items, and provide responses to the technical specifications, each set out at A, B and C above.

CITY INFORMATION

Successful proposer will be required to execute a contract citing all legal jurisdictions and choice of law within the State of North Dakota and providing a certificate of insurance, if on-site training is included.

EVALUATION OF PROPOSALS

The award may or may not be made to the firm submitting the lowest proposal cost. Award shall be made to the responsible offeror whose proposal is determined to be the most advantageous to the City, taking into consideration the evaluation factors set above. Only submissions that are complete and returned within the time limit will be considered.

SELECTION COMMITTEE AND PROCEDURE FOR REVIEW OF PROPOSALS

A Selection Committee consisting of at least five (5) members will be established to review and evaluate all proposals submitted in response to this RFQ. The Committee shall conduct a preliminary evaluation of all proposals on the basis of the information provided. The Committee will first review each proposal for compliance with the minimum qualifications and mandatory requirements of the RFQ. Failure to comply with any mandatory requirements may disqualify a proposal.

The City may arrange for a meeting with the submitting parties or entities to clarify any aspect of the proposals and to give each the opportunity to further establish their credentials. The selection committee has the responsibility to negotiate the most favorable cost, terms, and conditions to the City of Bismarck. The negotiating process may involve one or more RFQ responses and may continue until the actual award of the contract.

The City reserves the right to reject any and all proposals and to waive minor irregularities. The City further reserves the right to seek new proposals when such a procedure is reasonably in the best interest of the City to do so.

QUESTIONS REGARDING SPECIFICATIONS OR PROPOSAL PROCESS

To ensure fair consideration for all firms, the City prohibits communication to or with any department director, division manager, or employee during the submission process with the exception of those questions relative to interpretation of specifications or the proposal process. Such communications initiated by a firm may be grounds for disqualifying the offending firm from consideration for award of the proposal and/or any future proposal.

No interpretations of the meaning of the RFQ documents will be made to any bidder orally. Every request for such interpretation shall be in writing to the City of Bismarck Finance Department and to be given consideration must be received in writing prior to 11:00 A.M. CT on Friday, September 23rd, 2022. Direct inquiries to:

Dmitriy Chernyak, Finance Director, dchernyak@bismarcknd.gov, or Finance Department, 221 North 5th Street, PO Box 5503, Bismarck, ND 58506-05503

Any and all such interpretation will be in the form of an Addendum to the Contract Documents will be emailed to all prospective firms and posted on the City's website.

Additionally, the City prohibits communications initiated by a proposer to the City Official or employee evaluating or considering the proposals prior to the time an award decision has been made. Any communication between proposer and the City will be initiated by the appropriate City Official or employee in order to obtain information or clarification needed to develop a proper, accurate evaluation of the proposal. Such communications initiated by a proposer may be grounds for disqualifying the offending proposer from consideration for award of the proposal and/or any future proposal.

September 14, 2022

ADDENDUM NO. 1 CITY OF BISMARCK, ND SPECIAL ASSESSMENT
SOFTWARE PROCUREMENT

Bidders/contractors should note the following changes:

1. Request for Qualifications section:

A. Written proposals from qualified consultants will be accepted until 5:00pm CST on Friday, October 14, 2022.

/s/

Dmitriy Chernyak, Finance Director

City of Bismarck