

ST. TAMMANY PARISH

ASSESSOR'S OFFICE

ASSESSMENT ADMINISTRATION /CAMA
SOFTWARE

REQUEST FOR PROPOSAL

SEPTEMBER 4, 2019



**St. Tammany Parish
Assessor's Office**

St. Tammany Parish Justice Center
701 North Columbia Street • Covington, Louisiana 70433

Louis Fitzmorris
Assessor

ASSESSMENT ADMINISTRATION /CAMA SOFTWARE
REQUEST FOR PROPOSALS

The St. Tammany Parish Assessor, 701 N. Columbia Street, Covington, LA, 70433, shall receive sealed proposals for Assessment Administration / CAMA Software until 4:30 PM CDT Friday, October 11, 2019. They shall be publicly opened the following Tuesday, October 15, 2019, at 10:30AM CDT.

Detailed RFP specifications and forms may be obtained from the St. Tammany Parish Assessor, 701 N. Columbia Street, Covington, LA, 70433, (985) 809-8180.

Proposals shall be mailed or hand delivered, but must be received before October 11, 2019 at 4:30PM CDT.

All proposals shall be sealed, and shall note the project title and the submitting firm's name, addressed as follows:

Assessment Administration / CAMA Software

Louis Fitzmorris, Assessor, CLA

St. Tammany Parish Assessor's Office

701 N. Columbia Street

Covington, LA, 70433

Proposals received after October 11, 2019 at 4:30PM CDT shall be returned unopened.

The St. Tammany Parish Assessor reserves the right to reject any and all proposals.

Louis Fitzmorris, Assessor, CLA

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SECTION 1: INSTRUCTIONS TO PROVIDERS

Introduction

The purpose of this Request for Proposal (RFP) is to identify the firm that can best provide the software platform required to successfully implement a new Assessment Administration and Computer Assisted Mass Appraisal (CAMA) System for the St. Tammany Parish Assessor's Office (STPAO) located in Covington, Louisiana. Individuals, partnerships, or corporations responding to this RFP by submitting a proposal shall hereinafter be referred to as "Provider".

Providers are encouraged to provide the best possible solution to STPAO. If the Provider has more than one solution, the Provider is encouraged to submit multiple solutions under separate cover. A mandatory requirement of this RFP is the ability to meet all State of Louisiana mandatory legal LTC reporting requirements. Any and all costs associated with meeting these requirements should be clearly documented in the cost section of this RFP. The overall objective of this RFP is to modernize the assessor's office and to increase efficiency by replacing the system that is now in place with a system that includes current technologies and identifies hardware compatible with the proposed software. The system, as proposed, must be a system which has been successfully implemented and used over a reasonable period of time by other Assessor's offices located within or without the State of Louisiana.

Due to several time constraints, the Provider must be able to begin the implementation of the selected solution no later than November of 2019 and must complete the full implementation by March of 2021. This requirement is non-negotiable.

It is the intent of STPAO to procure Assessment Administration and CAMA services/products that will address functional and ownership requirements contained herein. While price is an important factor, the solutions' functionality and technical environment will carry most of the weight. The solution must: (1) utilize a relational database, preferably Microsoft SQL Server, (2) be ODBC compliant, (3) provide a user friendly on-line user interface, (4) be a standard release product modified for use in Louisiana ("Standard Release Product") supported by the Provider including enhancements, training, and support, and (5) have at least ten live installations of the proposed solution which have been successfully deployed and used at the time of evaluation. STPAO intends to utilize its existing PCs and server technology and prefers not to acquire additional hardware. If additional hardware and software is required to support/run Provider's proposed solution, Provider should identify these items in their proposal, with approximate acquisition costs.

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1. ST TAMMANY PARISH ASSESSOR'S OFFICE PROFILE

The St. Tammany Parish Assessor's office (STPAO) is a political subdivision of the State of Louisiana, created and authorized by the Constitution and laws of the State of Louisiana for the purpose of enumerating, listing, valuing and assessing property within the Parish of St. Tammany ("Parish"). The office is administered by an elected Assessor, Louis Fitzmorris, who serves a four-year term. His current term ends December 31, 2020, and the Assessor is not term limited. He was recently re-elected without opposition to a third term commencing January 1, 2021 thru December 31, 2024.

STPAO currently utilizes a Legacy in-house developed, Progress based program as its Assessment Administration and CAMA System. The software programs for all assessment operations are housed and maintained at the St. Tammany Parish Justice Center within the Assessor's Office. STPAO's user control is limited by maintaining security passwords, various code tables that are used as identifiers and keys for reporting. Very rudimentary reporting and query capabilities are provided, with limited user availability. Any policy changes that result in a program logic change or any special report requests are programmed in house.

2. ST. TAMMANY PARISH PROFILE

St. Tammany Parish (the "Parish") is governed under the provisions of a Home Rule Charter approved by the voters on October 3, 1998, as amended through November 21, 2015. The plan of government is the "president-council" form of government.

The Parish is composed of eight incorporated communities, has a total population of approximately 260,000 and has approximately 90,000 households as of the 2010 census. The Parish's area is approximately 1,125 square miles. The Parish is composed of commercial, residential and industrial properties. St. Tammany Parish currently consists of around 275,000 individual lots of record.

Louisiana law requires the Parish to provide the Assessor with facilities, including the software and equipment, necessary for the STPAO to fulfill its constitutional and statutory responsibilities. Accordingly, any contract entered into by STPAO and the Provider shall contain, among other terms and conditions, the condition that renewal or continuation of the contract is contingent on the Parish initially appropriating and thereafter appropriating on an annual basis, sufficient funds to pay for the license and fulfill the financial terms of the contract. If (a) the Provider has defaulted and has not cured the default, or (b) the new system has been accepted and the initial cost of the license and for deployment of the new system has been paid in full, STPAO is to have a perpetual license to use the Standard Release Product and control of the source code for it, and the ownership and control of the software specifically developed by Provider for STPAO (the "Solution") and the source code for the Solution, whether or not STPAO continues to contract with Provider for annual support and enhancement services. STPAO will not have the right to share the license assigned to

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it and the Provider source code with, or disclose other Provider Trade Secrets to any third party, except under the terms of a mutually acceptable confidentiality and non-disclosure agreement.

3. PROJECT INFORMATION

As a first step towards modernizing its office systems, STPAO conducted numerous internal and external sessions, including interviews with other Assessors, to define and document the necessary components and requirements for an Assessment Administration and CAMA system. Based on its findings during the conduct of its due diligence investigation, STPAO identified the minimum requirements and components required to satisfy present and reasonably foreseeable future STPAO system needs. These requirements and system components are detailed in the Software Technical Requirements (Section 3) of this RFP. The Software Technical Requirements and their implementation must satisfy best industry practices. Satisfaction of the Software Technical Requirements will be used as the primary means of measuring the ability of Provider's proposal to meet the requirements for the new system(s). At the conclusion of this RFP process, STPAO intends to purchase/license software and services from the most responsive Provider which offers the greatest benefit to STPAO.

4. DATA PROCESSING ENVIRONMENT

STPAO data processing environment is typical of one that has evolved over a number of years. It was written utilizing the Progress database platform and is on a server running Windows Server 2012.

STPAO has approximately 50 users with various levels of access to assessment data with limited ability to run both ad-hoc and pre-programmed reports. Users have the ability to create ad hoc reports. Some of the other applications currently in use at STPAO include: Geographic Information System (GIS) (ESRI ArcGIS 10.7), Microsoft Office Suite, and other similar office applications.

STPAO is developing a GIS using ESRI ArcGIS products. STPAO's preference is to leverage this GIS investment as the map viewing tool in the Assessment Administration and CAMA System. The inter-application communication architecture should be such that the information can be easily shared between applications and modified as necessary across all platforms.

One goal of STPAO is to automate as many processes as possible to increase office efficiency and reduce the chances of human error. As secondary goal, the Provider may include other office efficiency applications/tools, such as the ability to integrate productivity aides and electronic signatures.

The Louisiana Tax Commission (LTC) currently requires several reports from STPAO. These reports are available on the LTC web site (http://www.latax.state.la.us/Menu_DataFormats/DataStandards.aspx). Providers, as a requirement of this RFP, must produce these reports for submission to the Louisiana Tax Commission (LTC) in electronic format. **Providers will be REQUIRED to guarantee that their**

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system(s) can provide this functionality, and show successful electronic transmission of data from STPAO to the Louisiana Tax Commission (LTC) and show that the LTC accepts/certifies the data.

This project will result in the replacement of STPAO's legacy Assessment Administration and CAMA System.

5. EXISTING HARDWARE

Servers – All of the STPAO servers are running Microsoft Windows Server 2012 Standard or above with the exception of one which is Microsoft Windows Server 2008 R2. Most have solid state drives and are Dell PowerEdge servers.

Client PC's—There is a mix of computers in the office ranging in age from mid-2013 to present. There are 72 computers on our network, and all will be upgraded to Windows 10 Pro by January of 2020. Every work station has at least two monitors.

There are paper scanners (Fujitsu 7160, Xerox Documate 272, Xerox Documate 252, and Epson DS-530) and label makers (Brother QL-500) on some users' desk.

Printers -- STPAO has centrally located printers throughout the office. At this time, there are four printer/scanner/fax/copiers. For larger maps and GIS projects which use unconventional size prints there is a plotter (HP DesignJet T2530).

There are twenty HP 6940 printers on users' desk. There are several Ricoh C252 printer/copier/scanner machines in administrative offices.

SECTION 1-A: GENERAL CONDITIONS FOR CONTRACTS

1. SCOPE OF PROVIDER'S SERVICES

Provider agrees to develop, license, install, and service through the warranty period, and any extension of the warranty period, the STPAO software, services, and any materials set forth in the RFP and the Software Technical Requirements made a part of the RFP. All programs, intellectual property rights, material and labor that are needed to satisfy STPAO requirements and perform in accordance with the Provider's proposal shall be furnished by Provider and included in Provider's proposal. No additional programs, intellectual property, materials and labor will be furnished by STPAO, unless specifically identified in Provider's proposal and agreed to by STPAO in a written contract containing at least the minimum requirements set forth in this RFP and

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finally negotiated between the successful Provider and STPAO (the "Contract"). The proposal shall be made assuming that STPAO will use its existing operating systems, servers, computers and other hardware. STPAO may, at its expense, and in its sole discretion, obtain from other providers additional programs, servers, computers, and other hardware identified by Provider in its proposal as compatible with Provider's system; however, the Provider should not assume that STPAO will do that.

2. ASSIGNMENT AND SUBCONTRACTING

No portion of the system to be provided or the services to be performed under the proposal may be assigned or subcontracted to any other individual, firm or entity without the express and prior written approval of STPAO. It is expected that Provider will provide the system and perform all services required of it to fulfill the terms, conditions and warranties contained in its proposal and the Contract within its own organization, If Provider is unable to perform all of the services within its own organization, it shall identify the services in its proposal that are intended to be outsourced. The amount of services outsourced will be a factor used by STPAO to evaluate proposals. If the STPAO accepts a proposal in which a portion of the systems and services are permitted to be outsourced (subcontracted), as soon as practicable after the execution of the Contract, and in any event, at least seven (7) days prior to the time that any subcontractor shall commence any portion of the services, Provider will notify STPAO in writing of the names of the subcontractor and affiliations proposed for the services. Within a reasonable time after receiving the name(s), STPAO shall notify Provider if the subcontractor is acceptable or not. Provider will be fully responsible to STPAO for the acts and omissions of his subcontractor and of persons either directly or indirectly employed by them, as Provider is for the acts and omissions of persons directly or indirectly employed by him.

3. PROVIDER WARRANTIES AND INDEMNIFICATION

Provider will fully warrant that its system and services, whether performed by its personnel alone, its subcontractor alone, or jointly by Provider and its subcontractor, and the software, licenses and materials provided by Provider and third party developers and providers, (a) will perform as stated in the Provider's proposal; (b) will be suitable for STPAO's purposes and the requirements set forth in this RFP; (c) that Provider has obtained all licenses required of it to be obtained for its system; (d) that the system and services do not infringe on any copyright (or patent, if applicable); and (e) that Provider's system and services are and will be free from any defects or deficiencies. Provider will have the duty to disclose any defects and/or deficiencies at the time they become known or should have become known to Provider.

4. RELATIONSHIP TO BE ESTABLISHED

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Provider will not be an agent, partner, or joint venture partner with STPAO. If a Contract is executed by STPAO with Provider, the Contract will provide that the Provider is and will at all times be an independent contractor. Persons employed by Provider shall at all times be employees of the Provider and not STPAO. Under no circumstances will Provider's employees be entitled to the salary, benefits and privileges afforded employees of STPAO. Provider represents that it maintains a separate place of business, serves clients other than STPAO, and reports its income as a legal entity in accordance Internal Revenue Service laws and regulations.

Should a Provider employee get hurt and make claim against STPAO for personal injury. Provider will indemnify STPAO from any such claim and damages. In that case, STPAO will be considered the "statutory employer" of Provider and the exclusive remedy of Provider's employee in such situation will be for Worker's Compensation benefits.

5. PROVIDER'S PERSONNEL

STPAO reserves the right to request the removal of any Provider employee from the project. Provider agrees to, in good faith; comply to the maximum extent possible with such a request. Provider shall not transfer or reassign any essential personnel without the express written agreement of the STPAO. Should Provider cease to employ an essential individual or individuals, Provider will make every effort to employ an individual with greater or equal qualifications as a replacement subject to STPAO's approval. If STPAO does not accept an individual as a replacement, that will not be cause for the Provider to terminate the Contract.

STPAO shall have the right to reject any of the Provider's employees whose qualifications or performance is unsatisfactory in STPAO's good faith and reasonable judgment. Provider shall replace rejected employees with qualified employees promptly so as not to cause unreasonable delays in the project schedule.

6. TAXES

STPAO will not withhold Federal or State income taxes from any payments made to Provider. All compensation received by Provider will be reported to the Internal Revenue Service at the end of the calendar year in accordance with the applicable IRS regulations. It is the responsibility of Provider to make the necessary estimated tax payments throughout the year, if any, and Provider is solely liable for any tax obligation arising from Provider's performance of the Contract. Provider will indemnify STPAO against any demand to pay taxes arising from Provider's failure to pay taxes on compensation earned pursuant to the Contract.

Provider also understands and acknowledges that STPAO is exempt from sales tax and that STPAO will provide a certificate of exemption upon request.

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7. SUBMITTAL OF PROPOSALS

The Providers must submit their proposals in the format specified within this RFP. Providers must describe in reasonable detail the components of the offered system, and if a component is not developed or made by Provider, the names of the developers and/or makers of the component providing specific identifying information, such as name and version, model number and the like must be included. The proposal must describe in layman's terms how the system will accomplish the specific objectives of STPAO identified in this RFP and the Software Technical Requirements. The Provider must clearly state the price for all components of the system offered and the terms of payment. The proposal must be signed in *blue* ink. The proposal must be hand delivered by Provider or their agent, or sent by certified mail. The proposal will be submitted in a sealed envelope, marked on the front identifying the Provider's name and project title, *St. Tammany Parish Assessor, "ASSESSMENT ADMINISTRATION / CAMA SOFTWARE"* before the time set for receiving proposals. The schedule of events leading to implementation of the selected solution is:

DATE	EVENT
September 4, 2019	Date of issue of the RFP
September 30, 2019, 10:00AM CDT	Conference call with interested Providers
October 11, 2019, 4:30PM CDT	Proposals due from Providers
October 15, 2019, 10:00AM CDT	Opening of proposals
October 31, 2019	Final contracts due from successful Provider
November 12, 2019	All contracts signed
November 18, 2019	Implementation begins

A Provider phone conference will be conducted **Monday, September 30, at 10:00 AM CDT**. The purpose of this conference will be to provide interested Providers any additional clarification and address any questions to assist in submitting proposals that are as responsive as possible. Interested Providers must email STPAO at ibeer@stpao.org to receive conference sign-in credentials.

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8. REJECTION OF PROPOSALS

The St. Tammany Parish Assessor reserves the right to reject any proposal, any part of a proposal, or all proposals and to waive any informality.

NOTE: No proposals will be accepted unless this entire document is attached, including completed response to the Software Technical Requirements (Section 3), all required appendices, and a completed and notarized copy of the Transmittal Letter. Any other specifications, illustrations, or other materials necessary to describe items in the proposal completely should also be attached.

9. SUBSTITUTIONS

If the Provider is proposing new hardware and/or equipment as part of the system, the equipment must be new. In any case, an approximate price for new equipment is required as part of the proposal. STPAO may at its own discretion, and option, procure equipment from other sources.

10. TERMS OF PAYMENT

Payment for the selected solution must follow a four (4) year schedule, payable on January 1st of each year. Support cost should be billed quarterly. Any cost for additional functionality not included in the final contract must be approved by STPAO before any work begins and must be billed separately.

11. APPROPRIATION CLAUSE

The continuation of this contract is contingent upon the continuation of an appropriation of funds by the governing authority to fulfill the requirements of the contract. If the governing authority fails to appropriate sufficient monies to provide for the continuation of the contract or if such appropriation is reduced by any means provided in the appropriations ordinance to prevent the total appropriations for the year from exceeding revenues for that year or for any other lawful purpose and the effect of such reduction is to provide insufficient monies for the continuation of the contract, the governing authority may terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

12. CONFIDENTIALITY

If a proposal is accepted, Provider will be required to execute a mutual confidentiality and non-disclosure agreement with STPAO. It is the intent of STPAO to maintain as confidential the Providers proprietary and confidential information, and Trade Secrets, to the full extent that STPAO is permitted to do so by law. Providers are referred to LSA R.S. 44:1 for the definition of "Public Records".

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13. INSURANCE

Provider will be required to have and maintain insurance throughout the term on the Contract as will protect it from any claims arising out of the development, licensing, installation and provision of services to STPAO. The insurance must be written by an insurer authorized to contract business in the state of Louisiana having a Best's rating of A-/VII or better. Among the policies that Provider will have and maintain will be:

- (a) Commercial General Liability, including Contractor's Liability, Contractual Liability, Independent Contractor's Liability, Completed Operations, Copyright Infringement, Data Breach, and Products Liability, extended at least two (2) years after the date of final acceptance of the new system by STPAO, all on an occurrence basis, with Personal Injury Coverage and Broad Form Property Damage, including Completed Operations. Contractual Liability shall have deleted the exclusion pertaining to Third Party Beneficiaries. Coverage limits must be approved by STPAO.
- (b) Comprehensive Automobile Liability - \$1,000,000.
- (c) Worker's Compensation to the statutory minimum amount, covering all personnel employed by Provider and its subcontractors, or as otherwise required by Federal and State laws, including Employer's Liability to \$1,000,000 limits per occurrence. Worker's Compensation Insurance is required and no "alternative" forms of insurance will be acceptable.

STPAO requires that the below named Indemnified Parties be named as Additional Insureds.

A certificate of insurance in a form acceptable to STPAO will be required before any work on the Contract may be performed.

14. INDEMNIFICATION

To the fullest extent permitted by law, Provider will be required to protect, defend, indemnify and hold harmless the STPAO, including the Assessor, his staff, employees and agents ("Indemnified Parties") from and against every loss, item of damage, injury, expense, demand, claim (including claims for copyright infringement), cause of action, judgment or liability, of whatsoever kind or character, whether arising in contract or tort or under any statute for every element of recovery, including general and special damages, and all related fees and costs, such as the fees for consultants, developers and attorneys, resulting from Provider and its subcontractors sole or joint fault. If Provider and STPAO are jointly at fault, than Provider's obligation to indemnify STPAO shall be reduced by the amount of STPAO's comparative fault. Provider will provide insurance coverage for this contractual indemnification and provide an endorsement to the policies identified herein evidencing that such coverage is in place.

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15. LAW APPLICABLE, WARRANTY

The internal laws of the state of Louisiana, including the rules and regulations applicable to providing products and services to governmental agencies (disclosure of interests), shall exclusively apply to this RFP and any resulting Contract. Provider is strongly encouraged to familiarize itself with applicable Louisiana law. Venue for any legal proceedings initiated by STPAO, Provider or any other party shall be exclusively in the 22nd Judicial District Court for the Parish of St. Tammany, State of Louisiana.

Provider is to warrant in the contract signed by Provider with STPAO that the Standard Release Product and the Solution offered will perform in accordance with the proposal it submits in response to this RFP. The Proposal will not be merged into the contract; rather, the proposal shall at all time be the yardstick by which STPAO will measure compliance by Provider with its proposal and the performance of the system it proposes. Damages for breach of this warranty shall not exceed the total amount that STPAO is expected to pay for the installed and accepted system offered by Provider.

In addition, Provider is expected to offer an express written warranty that contains terms and conditions acceptable to STPAO which will run from the date that the Standard Release Product and the Solution are finally accepted by STPAO (See Appendix 1). Final acceptance of the Provider's system will not be granted until the current assessment cycle has passed (i.e. when the Louisiana Tax Commission has certified the new tax roll) and the results generated by the Provider's system and the results generated by the STPAO's parallel legacy system match.

SECTION 2: COMPUTER SOFTWARE PROPOSAL SPECIFICATIONS.

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1. GENERAL REQUIREMENTS AND CONDITIONS

Proposals must provide for the Assessor's office to have full control of the Standard Release Product source code, ownership of the Solution and its source code, and all executable codes to enable modifications to meet the organization's specific needs, and include a perpetual, non-exclusive license that permits employees and authorized users to use the software

Proposals must provide for Provider support service options and the ability to utilize STPAO in-house IT support services or alternative IT support service providers.

Proposed solutions must utilize Mobile Assessor, ESRI ArcGIS, Apex Sketch, and other databases and systems as noted in the requirements in Section 3.

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All available training options and methods shall be identified, including (1) A user training guide which includes information on proper navigation and use of the solution and quick reference guides for key business processes, (2) Onsite business process reviews to map our current business processes and staff roles to the new solution and to customize the user training plan, (3) Foundational training to understand the basics and how to navigate throughout the entire solution, (4) In-depth training on the solution's workflows and best practices for all specific business roles, and (5) Training on how to utilize Provider's technical support services.

Provider's system will run parallel to STPAO current systems during all of the implementation during 2020. Data must be refreshed between systems at least nightly. STPAO systems will be archived only after the full implementation of Provider's system is accepted as complete.

All software services required by these specifications shall include program documentation and installation of all itemized applications and processes unless otherwise agreed to by the STPAO.

Providers must utilize Agile Methodology in their approach to successful software development to enable quicker and more successful responses to customer's needs, technology advancements, and business conditions.

The selected Provider must be a Microsoft Gold Partner with a commitment to the highest standards of Microsoft technical expertise and to evolving Microsoft technologies.

Where manufacturers names, numbers, or specific terminology are used in these specifications, it is understood that this is for the purpose of conveying the quality standard of products desired, including the general style, type character and quality, and not restricted or limited.

2. APPLICATIONS

Software must be developed or customized specifically for use in the State of Louisiana. Providers must have at least ten live installations of the proposed solution within the United States at the time of evaluation. Proposal shall include pricing for licensing of a minimum of 50 users, and multiple on-line users.

3. SERVICE

Because of the complexities of the applications required by STPAO, the successful Provider must show that they have trained support personnel and support procedures that can be easily accessed and available during STPAO's hours of operation. The rates for such support services shall be included in the proposal together with an indication of how long the rates will be in effect and the procedure for changing the rates. Also, because of the complexity of the solution, preference will be given to Providers that demonstrate consistent and verifiable expertise in the delivery and support of the proposed solution.

4. REFERENCES

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Provider shall provide, at least three references of existing customers, complete with name, description of customer's operation, and full contact information. STPAO shall have the right to contact each of the references and discuss freely each references experience with Provider's system, installation services and support experiences. Provider will notify each reference and specifically authorize direct communications with STPAO and waive any expectation of confidentiality resulting from agreements that may exist between Provider and each reference.

Final Draft

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SECTION 3: SOFTWARE TECHNICAL REQUIREMENTS

The successful Provider must provide an Assessment Administration and CAMA System which meets or exceeds the following specifications:

PLEASE INDICATE ONE OF THE FOLLOWING APPROPRIATE RESPONSES FOR EACH CORRESPONDING REQUIREMENT IN THE "RESPONSE" COLUMN.

- 0) INDICATES INABILITY TO PROVIDE THE FUNCTIONALITY.
- 1) FUNCTIONALITY DOES NOT CURRENTLY EXIST IN PROPOSED SOLUTION AND CUSTOM/ADDITIONAL PROGRAMMING WILL BE REQUIRED.
- 2) THIS REQUIREMENT IS PLANNED FOR A FUTURE RELEASE AND WILL BE OFFERED TO STPAO, AT NO ADDITIONAL CHARGE, AND INSTALLATION ASSISTANCE, IF REQUESTED, WILL BE PROVIDED.
- 3) THIS REQUIREMENT IS SCHEDULED FOR RELEASE IN THE NEXT RELEASE, AND WILL BE INCORPORATED, AT NO ADDITIONAL CHARGE ONCE RELEASED.
- 4) THIS REQUIREMENT IS IN BETA RELEASE AND HAS NOT BEEN RELEASED FOR GENERAL DISTRIBUTION. REQUIREMENT CAN BE DEMONSTRATED AND WILL BE INCORPORATED, AT NO ADDITIONAL CHARGE ONCE RELEASED.
- 5) THIS REQUIREMENT CURRENTLY EXISTS AND CAN BE DEMONSTRATED.

STPAO may not implement all functionality outlined in this document. Customization items will be selected based upon cost and associated benefits to STPAO.

1. SOLUTION FEATURES AND CAPABILITIES

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Provider's solution must include the following features and capabilities:

Item #	Requirement	Response					
1-1	Run on Microsoft Windows Server 2012 or higher, with client compatibility for Microsoft Windows 10 or higher	5	4	3	2	1	0
1-2	Provide Real Property appraisal for commercial, industrial, and residential properties	5	4	3	2	1	0
1-3	Provide a multi-user, internet based, REST compliant user interface	5	4	3	2	1	0
1-4	Provide sales, income, and cost appraisal approaches for commercial and industrial properties	5	4	3	2	1	0

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1-5	Be a true parcel-based system to allow for data to be exported for use with the STPAO GIS system. The system should have built-in mapping capabilities leveraging ESRI mapping services	5	4	3	2	1	0
1-6	Allow for viewing of items, current ownership, current deeds parcel assessments, and parcel history, and notes all from one screen	5	4	3	2	1	0
1-7	Provide workflow management with advanced filtering and mass complete functions	5	4	3	2	1	0
1-8	Provide a property review work feature for future reappraisal review reminders	5	4	3	2	1	0
1-9	Provide for appeal tracking and management	5	4	3	2	1	0
1-10	Allow multiple criteria search capabilities	5	4	3	2	1	0
1-11	Integrate with multiple permit systems, including My Permits Now and Builder's Radius	5	4	3	2	1	0
1-12	Provide a "new and incomplete construction" work feature to track review of new construction	5	4	3	2	1	0
1-13	Provide a "unmatched/unresolved" work feature to track and resolve unmatched permits	5	4	3	2	1	0
1-14	Provide a "value review" work feature to ensure supervisor review of value changes	5	4	3	2	1	0
1-15	Ability to maintain both current and future reappraisal lookups and schedules simultaneously	5	4	3	2	1	0
1-16	Provide both deferral and exemption work features	5	4	3	2	1	0
1-17	Provide a multi sale work feature for managing multi-sales	5	4	3	2	1	0
1-18	Provide a mass update tool for residential and commercial properties	5	4	3	2	1	0
1-19	Provide sales processing to ensure sales are tracked and property data is corrected for accurate sale ratio calculations and reports	5	4	3	2	1	0
1-20	Provide for complete security of the system thru an administrator interface allowing to set multiple roles and functions with different security levels	5	4	3	2	1	0
1-21	Provide an automatic audit trail that captures all changes to the tax roll to allow Real Property history tracking	5	4	3	2	1	0
1-22	Provide for partial Homestead Exemption calculations; giving homestead exemption based on percentage of ownership	5	4	3	2	1	0
1-23	Provide ability to load all historical assessment records	5	4	3	2	1	0
1-24	Reporting function must provide a detailed parcel/owner report that is also capable of attaching a property photograph, when available	5	4	3	2	1	0
1-25	Ability to provide data for the current parish tax bills in Louisiana Tax Commission (LTC) format	5	4	3	2	1	0
1-26	Capable of adding Louisiana Legislative Auditor's codes to a millage rate file	5	4	3	2	1	0

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1-27	Ability to prepare name/address/parcel data for various mailings that are printed by an outside printing service, both regularly scheduled and ad-hoc	5	4	3	2	1	0
1-28	Ability to produce STPAO tax roll in Louisiana Tax Commission (LTC) export format	5	4	3	2	1	0
1-29	Ability to prepare "Microsoft Mail Merge" files for various mailings that are done in-house	5	4	3	2	1	0
1-30	Convert existing and legacy assessment data to the formats required to effectively operate Providers system	5	4	3	2	1	0
1-31	Provide ability to search for parcels using user generated complex queries and provide comprehensive search tool for Tax Roll records	5	4	3	2	1	0
1-32	Must allow calculation and posting of timber, agriculture, and horticulture use based on special use tables. (Use Value Assessments)	5	4	3	2	1	0
1-33	Must allow for all sales to be flagged as valid or invalid	5	4	3	2	1	0
1-34	Must have built in balancing tools for finding Louisiana Tax Commission (LTC) required fields and duplicate tax codes	5	4	3	2	1	0
1-35	Must have a millage validation for reconciliation of system mills to Louisiana Tax Commission (LTC) mills	5	4	3	2	1	0
1-36	Ability to include extra fees or charges	5	4	3	2	1	0
1-37	Provide complete seamless integration with Mobile Assessor software	5	4	3	2	1	0
1-38	Provide complete seamless Integration with Apex Sketch	5	4	3	2	1	0
1-39	Provide complete seamless Integration with EagleView (Pictometry) online	5	4	3	2	1	0
1-40	Auto assignment of work to appraisers responsible for specific market area	5	4	3	2	1	0

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2. PARCEL MAINTENANCE

Item #	Requirement	Response					
2-1	Provide for editing assessment data for multiple years by assigning an "effective" date	5	4	3	2	1	0
2-2	Provide real property transfers allowing multiple owners to be listed on each transfer by percent of ownership and individual addresses for each owner	5	4	3	2	1	0
2-3	Track all ownership (current, past, including multiple owners) information	5	4	3	2	1	0
2-4	Handles deed information on transfer of property and indicator for verifying sale price	5	4	3	2	1	0
2-5	Detailed parcel or owner listings	5	4	3	2	1	0
2-6	Separate areas for assessment notes, private notes, and legal descriptions and allow notes to be excluded from online parcel viewer	5	4	3	2	1	0
2-7	Application shall allow the user to rename Parcel Identification Number (PIN Map, block, lot, ext.) without losing any parcel, improvement, and/or assessment information	5	4	3	2	1	0
2-8	Application must be capable of supporting multiple physical or E911 addresses	5	4	3	2	1	0
2-9	Application must be capable of supporting multiple section, township and ranges per parcel	5	4	3	2	1	0
2-10	Application must be capable of supporting multiple subdivisions per parcel	5	4	3	2	1	0

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3. ASSESSMENT MAINTENANCE

Item #	Requirement	Response					
3-1	Provide for the application of tax millage rates at various levels in the system and shall include a utility to allow maintenance and updating of millage rates assigned	5	4	3	2	1	0
3-2	Application will support separate parish, municipal and non-municipal rates and their associated codes	5	4	3	2	1	0
3-3	Be able to retain multiple tax years and have the ability to seamlessly view assessment and parcel information from prior years	5	4	3	2	1	0
3-4	Provide accurate tracking of real property with an effective date record system	5	4	3	2	1	0
3-5	Provide the ability to inventory land class and improvements on each land class	5	4	3	2	1	0
3-6	Must be able to adhere to the Louisiana Tax Commission (LTC) property codes	5	4	3	2	1	0
3-7	The application must be able to freeze real property assessments for property owners that qualify for the disability freeze or those over specified age (e.g. 65) that have an approved homestead exemption application.	5	4	3	2	1	0
3-8	The application must be able to freeze real property assessments for tax abatements of historical property assessments.	5	4	3	2	1	0
3-9	The application must be able support 100% disabled homesteads and homestead exemptions greater than \$75,000 for disabled veterans.	5	4	3	2	1	0
3-10	The application must be able to support mass transfers.	5	4	3	2	1	0
3-11	User must be able to change parcel number without losing data.	5	4	3	2	1	0
3-12	The application must be able to support tax accounts, allowing multiple assessments to be attached to one tax account.	5	4	3	2	1	0
3-13	The application must be able to limit the homestead exemption to a single property, regardless of how many properties are contained within a single taxpayer's account.	5	4	3	2	1	0
3-14	The application must support percentages of ownership for multiple owners of a parcel as well as the owners' percentage of the tax bill.	5	4	3	2	1	0
3-15	The application shall allow the user to transfer real property to a new owner within the assessment application.	5	4	3	2	1	0
3-16	Allow ability to calculate taxes on a single parcel, all parcels an owner has, as well as prorated taxes where ownership and taxes are separated.	5	4	3	2	1	0
3-17	Must maintain flexibility to assigning tax districts, including ability to assign tax districts to an item, to a class of property, and with the ability to assign a percent of the property to a specific Millage.	5	4	3	2	1	0
3-18	Must be able to summarize values and tax calculations according to the Louisiana Tax Commission (LTC) guidelines as well as Parish defined classifications.	5	4	3	2	1	0

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3-19	Ability to maintain all appropriate Louisiana Tax Commission (LTC) taxation tables.	5	4	3	2	1	0
3-21	Provide ability to fully exempt property from taxation where warranted (e.g. surviving spouses for Killed in Action)	5	4	3	2	1	0
3-22	Provide photo management including simultaneous upload of multiple photos.	5	4	3	2	1	0
3-23	Provide “side by side” sales view for tracking market changes	5	4	3	2	1	0

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4. REPORTING

Item #	Requirement	Response					
4-1	Abstracts, tax rolls, listing, grand recaps, abstract summary, tax notices, etc.	5	4	3	2	1	0
4-2	Have the capability to support templates for prepopulating and printing standard forms (such as LATS, Use Value forms, homestead cards, homestead exemption applications, and tax notices)	5	4	3	2	1	0
4-3	Include interfacing with Microsoft Word to create correspondence, including form letters (such as over 65 notices), transfer notices, property bonds, notice of value, etc	5	4	3	2	1	0
4-4	Parcel information must be able to print a photograph	5	4	3	2	1	0
4-5	Support of sales reports associated with sale deeds	5	4	3	2	1	0
4-6	Allow the user to create custom ad hoc reports against vendor supported data sets (views, tables, etc.)	5	4	3	2	1	0

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5. COMPUTER ASSISTED MASS APPRAISAL (CAMA) SYSTEM

Item #	Requirement	Response					
5-1	The application shall provide a Computer Aided Appraisal System (CAAS) or a Computer Aided Mass Appraisal (CAMA) System for calculating improvement values	5	4	3	2	1	0
5-2	The application shall allow the user to set specific reappraisal rates that can be applied to an item on the tax roll for adjustment of the assessed value	5	4	3	2	1	0
5-3	The application shall have the ability to update the listing record periodically (as determined by the parish) from real property data	5	4	3	2	1	0
5-4	The application shall provide the Sales Comparison program to compare sales of property containing the same characteristics (acreage or other land characteristics, square footage of improvement, number of bedrooms, etc.), using either subdivision or neighborhood codes as a filter	5	4	3	2	1	0
5-5	When a Special Assessment Level is removed from a property, the CAMA module must be able to determine an appropriate assessment value	5	4	3	2	1	0
5-6	Must support multiple customizable CAMA models	5	4	3	2	1	0
5-7	Must support statistical modeling of CAMA data to assessment data with filtering of areas, price per square foot and other CAMA data	5	4	3	2	1	0
5-8	Must support photo comparisons for standardizing qualitative values, integrating with CAMA for updates to those values	5	4	3	2	1	0
5-9	Must allow for an unlimited number of sales per parcel with a subset of those to be viewable online	5	4	3	2	1	0
5-10	Must support both additive and multiplicative model formats.	5	4	3	2	1	0
5-11	Must allow interactive user-definable selection criteria for identification of comparative sales	5	4	3	2	1	0
5-12	Must allow for comparable sales prices to be adjusted based on coefficients produced by parish provided regression analysis	5	4	3	2	1	0
5-13	Provide for the ability to identify appraisal area, neighborhoods and sub-neighborhoods for analysis purposes	5	4	3	2	1	0
5-14	Accommodate different units of measure, i.e., square foot, front foot, acre, and site	5	4	3	2	1	0
5-15	Must incorporate flexible export capabilities with definable columns and orders in CSV, Excel or other suitable format	5	4	3	2	1	0

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6. PERSONAL PROPERTY

Item #	Requirement	Response					
6-1	Must be able to maintain a "Personal Property" list by company for each year with the ability to "bring forward" all assets from year to year	5	4	3	2	1	0
6-2	Must be able to link multiple personal property reports with a physical address and/or land parcel	5	4	3	2	1	0
6-3	Ability to identify commercial/industrial accounts which either did not report or reported late. Capability to mass apply a percentage increase determined by the Assessor to each of these accounts	5	4	3	2	1	0
6-4	Support calculation of itemized personal property as it relates to parcels. Handle current oil and gas regulations set forth by the Louisiana Tax Commission (LTC)	5	4	3	2	1	0
6-5	Support parcel information printing individually or in batches	5	4	3	2	1	0
6-6	Ability to apply a percentage increase to individual items of a parcel or to all items at once	5	4	3	2	1	0
6-7	The Louisiana Tax Commission (LTC) composite multiplier tables shall be built into the software for calculating personal property values automatically. The Provider shall supply updated LTC composite multipliers with annual maintenance	5	4	3	2	1	0
6-8	The software will allow the option to update the tax roll per parcel with the additional option of batching the process	5	4	3	2	1	0
6-9	Provide bar coded link to originating record on correspondence created from the application	5	4	3	2	1	0
6-10	Provide Personal Property work queues for management of the business listing processes	5	4	3	2	1	0
6-11	Ability to maintain multiple years of depreciations schedules for Business property simultaneously	5	4	3	2	1	0
6-12	Support for micro millages.	5	4	3	2	1	0
6-13	Provide tracking of multiple abstracts	5	4	3	2	1	0

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7. DOCUMENT LETTERS INTEGRATION

Item #	Requirement	Response					
7-1	Must allow for multiple photographs and scanned documents per parcel.	5	4	3	2	1	0
7-2	Convert the Assessor's existing electronic photos to be accessible by the software.	5	4	3	2	1	0
7-3	Convert current document imaging archive; integrate current scanned documents with the software.	5	4	3	2	1	0
7-4	Must allow the capability to integrate application documents (Word, Excel, etc.) that are related to parcels and business personal property.	5	4	3	2	1	0
7-5	Application's document management system shall support scanners from document entry screens of the listing record	5	4	3	2	1	0
7-6	Support signature pads and automatic attachment to parcels of signed documents	5	4	3	2	1	0
7-7	Provide bar coded link to originating record on correspondence created from the application	5	4	3	2	1	0
7-8	Support scanning of attachments directly into software, by-passing the need to scan outside of software and then attach	5	4	3	2	1	0

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8. WEBSITE INTEGRATION

Item #	Requirement	Response
8-1	System provided web application can be integrated with STPAO hosted web site	5 4 3 2 1 0
8-2	System provided web application provides parish-wide property searches for data migrated to the new system	5 4 3 2 1 0
8-3	Using the STPAO website, the software must provide property assessment reports that include assessment information as well as deed information, taxes, legal descriptions, class information, and owner information	5 4 3 2 1 0
8-4	Using the STPAO website, must be able to supply forms that can be filled out and submitted to STPAO online	5 4 3 2 1 0

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SECTION 4: ADDITIONAL NEEDS

Third (3rd) party licenses needed:

What	Where	How Many

Any required equipment beyond that currently installed must be clearly listed with the cost of this equipment clearly specified:

What	Where	How Many

Miscellaneous needs:

What	Where	How Many

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SECTION 5: EVALUATION OF PROPOSALS

The STPAO reserves the right to accept the most responsive and responsible proposal commensurate with the overall quality of the solution to produce what it considers to be in the best interest of STPAO. The STPAO also reserves the right to reject any or all proposals, or any part of a proposal. Providers must list individual unit prices and maintenance rates when items may be purchased as individual units.

The STPAO will select the successful Provider based on the following criteria:

1. How well a Provider's submitted solution fulfills the needs expressed in these specifications;
2. To what extent any products submitted in the proposed solution meet or exceed the minimum required technical specifications;
3. The competitiveness and reasonableness of pricing for the proposed solution;
4. The expediency with which a solution can be provided;
5. The company's experience and reputation in the industry;
6. The company's depth of personnel and ability to complete the project.

Final selection of the successful Provider will be based on the evaluation of technical, commercial, and cost factors in the process outlined above. The STPAO reserves the right to perform additional analysis and evaluation.

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SECTION 6: PROPOSAL PROCEDURES

1. SUBMITTAL AND OPENING OF PROPOSALS

All proposals shall be enclosed in a sealed envelope which will be marked with the name of the proposal being submitted, and shall either be mailed or hand delivered to:

Assessment Administration / CAMA Software

Louis Fitzmorris, Assessor, CLA

St. Tammany Parish Assessor's Office

701 N. Columbia Street

Covington, LA, 70433

Phone Number: (985) 809-8180

2. COMMUNICATIONS REGARDING THIS PROPOSAL

Please direct **TECHINCAL REQUIREMENT INQUIRES**, in writing or e-mail, regarding this RFP to:

Ian Beer

(985) 809-8540 (Office)

IT Director

St. Tammany Parish Assessor's Office

701 N. Columbia Street

Covington, LA 70433

email: ibeer@stpao.org

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3. GENERAL TERMS AND CONDITIONS

The following terms and conditions apply to all proposals to provide services to STPAO:

All proposals received will be open and available for public inspections.

STPAO expressly reserves the following rights:

1. To reject any or all irregularities in the proposals submitted.
2. To reject any or all proposals or portions thereof.
3. To base awards with due regard to quality of services, experience, compliance with specifications, and other such factors as may be necessary in the circumstances.
4. To make the award to a Provider whose proposal(s), in the opinion of STPAO, is in the best interest of STPAO.
5. To not award a contract.
6. To not procure or contract for services or supplies.

4. PROPOSAL FORMAT

All requirements within this RFP must be addressed in order for the contract to be given full consideration and should include the following:

1. A *Transmittal Letter*, signed by an authorized representative of the Provider, substantially in the form of Appendix 2, duly notarized, confirming that the Provider is willing to perform the required scope of work and enter into a contract with the STPAO. The *Transmittal Letter* should include the name, title and contact information of the person who will be responsible for Provider performing under the Contract.
2. If Provider is a corporation, Provider shall attach to the Letter a certified copy of a current resolution authorizing the person signing the letter to sign the letter and to submit the proposal. If the Provider is a limited liability company (LLC), excerpts from the operating agreement, a unanimous consent of members or other document confirming the authority of the person to sign the letter and submit the proposal. If Provider is any other legal entity, documentation of authority in a form satisfactory to STPAO, which shall be obtained in advance of submitting the *Transmittal Letter* and proposal.
3. A memorandum (the "Memorandum") directed to STPAO which includes, among other things:

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- a. A brief description of Provider's understanding of STPAO's objectives and requirements, its approach to meeting the objectives and requirements, and a summary of Provider's ability to perform the scope of work described in the RFP;
- b. A corporate (business) profile, including affirmation that the responding firm has been in existence at least 5 years, has not filed for bankruptcy relief or reorganization, and has a banking relationship with a state or nationally chartered bank;
- c. Identifies the members of the project installation team, including their roles and qualifications specific to this project;
- d. Identifies each Assessor's office that is presently using Provider's proposed application;
- e. Clarifies the maintenance and/or support services that Provider offers specifically for the applications offered in its proposal, and any optional services, together with the rates and other information requested herein about the services;
- f. A proposal for software installation, training and recurring maintenance costs; and
- g. A discussion of an exit strategy in the event that STPAO decides to use a different Provider in the future.

For the Provider's Proposal to be considered, Provider must submit five (5) complete copies of its proposal, including all of the "Request for Proposal Documents" identified in this RFP, more particularly: (a) the duly notarized *Transmittal Letter*, substantially in the form of the *Transmittal Letter* attached hereto as Appendix 2; (b) the certified resolution, unanimous consent or other document authorizing the signer to sign the letter and submit the proposal; (c) the Memorandum; (d) the *Total Cost Summary*, in the form of Appendix 1; and (e) the written responses required pursuant to the provisions of Section 3, Subsections 1-8, inclusive.

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APPENDIX 1:

TOTAL COST SUMMARY

Category	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Application Software						
Customization Costs						
3 rd Party Software (including Licenses)						
Maintenance, Warranty, and Support						
Training Costs						
Equipment Costs						
Data Conversion Costs						
TOTALS PER YEAR						

Provider is to include any financing options available.

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APPENDIX 2:

TRANSMITTAL LETTER

STATE OF _____

PARISH/COUNTY OF _____

The undersigned Provider hereby declares and represents that she/he: a) has carefully examined and understands the requirements of STPAO as stated in this RFP and in the Software Technical Requirements; b) has not received, relied on, or based the Proposal on any verbal instructions contrary to the Proposal Documents, c) has personally inspected and is familiar with the scope of work, and hereby proposes to provide the services required all in strict accordance with the Request for Proposal documents.

The undersigned Provider further agrees that this proposal will remain in effect for not less than one hundred twenty (120) calendar days from the date that proposals are due, and that this proposal may not be withdrawn or modified during that time.

The undersigned Provider further agrees that if selected by STPAO to provide the new system and perform the services identified in the RFP and the undersigned's proposal, that Provider will enter into a binding contract with STPAO which will contain the terms and conditions set forth in this RFP and negotiate in good faith such other terms and conditions that are reasonable not specifically addressed in the RFP.

In order to induce STPAO to consider this proposal, Provider irrevocably waives any existing rights which it may have, by contract or otherwise, to require another person or corporation to refrain from submitting a proposal to or performing work or providing supplies to STPAO, and Provider further promises that it will not in the future directly or indirectly induce or solicit any person or corporation to refrain from submitting a bid or proposal to or from performing work or providing supplies to STPAO.

Being first duly sworn, on my oath, I hereby certify that this proposal is genuine and not a sham or collusive proposal, or made in the interests, or on behalf of, any person not therein named; and I have not directly or indirectly induced or solicited any Provider or supplier on the above work to put in a sham proposal or any person or corporation to refrain from submitting a proposal; and that I have not in any manner sought by collusion to secure to myself an advantage over any other Provider(s) or person(s).

Signature _____

Notary Public in and for the State of _____

Printed Name _____

Residing at _____

Firm _____

My commission expires _____

Phone Num: (____) ____ - ____

THIS PAGE MUST BE SIGNED, NOTARIZED, AND RETURNED WITH THE PROPOSAL.