|  |
| --- |
|  |
| **BUREAU OF FISCAL SERVICES** **Procurement Unit** |  |  |

**August 18, 2016**

**Amendment #4**

**For Request for Proposals (RFP) 15-08 Real Property Tax System**

To All Potential Bidders:

The Department is issuing Amendment #4 to amend language in the following sections:

* XI. Proposal Evaluation
* Attachment E – Functional Requirements Response Form

A corrected page is attached to this document. All deletions are shown as shaded, strike-through text, all additions are made in blue text.

All other requirements and conditions remain as indicated in the RFP.

1. **Phase Two Evaluation**

Bidders who pass Phase One of the evaluation will be further evaluated as follows:

1. **Functional /Technical/General Requirements** - 45 Points
2. **MWBE Component** – 5 Points
3. **Financial Requirements** - 30 Points

Bidder’s financial proposals will be scored concurrently and separately from the Technical evaluation.

1. **System Presentation** - 20 Points

To further evaluate the Bidder’s proposed System, the State requires the Bidder to demonstrate how the proposed System meets the Functional**,** ~~and~~ Technical**,** **and General** Requirements of this RFP.

All Bidders will be required to participate in a System Presentation. The Bidder will be given a minimum of two week’s notice of the date and time of the presentation. The presentation will be an opportunity for the Bidder to provide an overview of its System, demonstrate a clear understanding of the needs, demonstrate the ease of use for end users and demonstrate knowledge and experience to successfully provide the Services required.

The presentation will not be an opportunity to cure material omissions in the Bidder’s proposal and is not a substitute for a well written proposal.

**Note: The Bidder’s presentation must not reference the cost component of the bid, as this is evaluated separately.**

The Department will record the presentation which will become part of the procurement record. The recording will be subject to the same Freedom of Information Law requirements as written documents.

Place: New York State Department of Taxation and Finance, located at W.A. Harriman State Office Campus, Albany, NY 12227. The Bidder will be responsible for all costs associated with the presentation, including travel costs.

Attendees: The Bidder should bring a team of qualified staff to present the demo. In addition to sales staff and technical team members, the Bidder should include those staff members with Real Property Tax administration knowledge.

| **Requirement No.** | **Requirement Status****M=Mandatory****D=Desirable** | **Requirement** |
| --- | --- | --- |
| **Note: Failure to provide sufficient detail to the mandatory topics of this section will result in the Bidder being deemed non-responsive and removed from further consideration.** |
|  | **F** | **CO** | **CU** | **TP** | **SR** | **CR** | **N** |
| **~~D.~~J. Standard Reports (M) – In response to this section, the Bidder must identify if the report is Fully Functioning (F), requires Configuration (CO), or requires customization (CU) AS WELL AS if the report is a Standard Report (SR) or Custom Report (CR). In addition, the Bidder must identify if the software is Third-Party (TP), not included in this Proposal (N), and indicate the level of severity of the change utilizing “H” for High, “M” for Medium, or “L” for Low.** |
|  | Narrative to describe the System’s Standard Reporting capabilities: |
|  | **F** | **CO** | **CU** | **TP** | **SR** | **CR** | **N** |
| **1.** |  | **General Reporting** |  |  |  |  |  |  |  |
| 1.a. | M | * + The System must provide for the following general capabilities:
		- If user choices need to be made prior to report preparation, these choices must have the option of being saved and recalled by the user for use at a later time.
 |  |  |  |  |  |  |  |
| 1.b. | M | * + - Users must be able to be print to a designated location.
 |  |  |  |  |  |  |  |
| 1.c. | M | * + - Reports must have the option to have the result set be saved as raw data, in several standard formats, for local use external to the System.
 |  |  |  |  |  |  |  |
| **2.** |  | **Agricultural Reports** |  |  |  |  |  |  |  |
| 2.a. | M | The Agricultural Assessment Report provides a summary of calculations for the amount of the agricultural assessment inside or outside an Agricultural District. Each year a schedule of Agricultural Assessment Values per Acre are certified for use in computing agricultural assessments for Assessment Rolls. These values are not indicative of current use values for those land types and must not be used when determining the Assessed Value for normal assessing purposes.The System must provide reporting by municipality and Tax Roll year.  |  |  |  |  |  |  |  |