

SEP 19 2022

SHERRY MURRAY
COUNTY CLERK

220696

SA&I 1-4040 (2000)

Canadian _____ County, Oklahoma
COUNTY PURCHASING OFFICE
Canadian _____ County Court House
El Reno _____, Oklahoma
Phone: (405) 295-6125

INVITATION TO BID

PLEASE REVIEW TERMS AND CONDITIONS ON REVERSE
SIDE RELATING TO SUBMISSION OF THIS BID.
Notarized Affidavit completions and signature required on reverse side.

DATE ISSUED September 19, 2022
Page 1 of 2

BID NUMBER #2023-#03	Computer Assisted Mass Appraisal (CAMA) System / County Assessor	BID CLOSING DATE AND HOUR Oct. 7, 2022 @ 4:00pm	REQUIRED DELIVERY DATE SEE SPECIFICATIONS _____ Days after award of Purchase Order
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TERMS Net, FOB this bid will open 10-10-2022 during Commissioner's Meeting that begins at 9:00am	DATE OF DELIVERY: SEE SPECIFICATIONS
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ITEM	QUANTITY	UNIT OF ISSUE	DESCRIPTION	UNIT PRICE	TOTAL
1 or more			<p>Canadian County Assessor is seeking to obtain fixed price proposals from qualified solutions providers for a Computer Assisted Mass Appraisal (CAMA) System.</p> <p>See Specifications attached.</p> <p>The Board of Canadian County Commissioners reserves the right to reject any and all bids or to award all or any portion of the items bid. All data will be considered in the awarding of the bid including the delivery time.</p> <p><u>The terms & conditions of this document must be completed and returned or the bid will be rejected.</u></p> <p>Contact person: Joel Foster, GIS Coordinator 200 N Choctaw El Reno, OK 73036 (405) 295-6052</p>		<p>\$ _____</p> <p>Total</p>

APPROVED

Date: 9-19-22

Matt White

Officer or Department Head

TERMS AND CONDITIONS

1. Sealed bids will be opened in the Commissioner's Conference Room, Canadian County Courthouse, 201 N. Choctaw Avenue, El Reno, Oklahoma, at the time and date shown on the invitation to bid form.
2. Late bids will not be considered. Bids must be received in sealed envelopes (one to an envelope) with bid number and closing date written on the outside of the envelope.
3. Unit prices will be guaranteed correct by the bidder.
4. Firm prices will be F.O.B. destination.
5. Purchases by Canadian County, Oklahoma, are not subject to state or federal taxes.
6. This bid is submitted as a legal offer and any bid when accepted by the County constitutes a firm contract.
7. Oklahoma laws require each bidder submitting a bid to a county for goods or services to furnish a notarized sworn statement of non-collusion. A form is supplied below.
8. Bids will be firm until 11/10/2022
(DATE)

AFFIDAVIT: I, the undersigned, of lawful age, being first duly sworn on oath say that he (she) is the agent authorized by the bidder to submit the above bid. Affiant further states that the bidder has not been a party to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding; or with any state official or employee as to quantity; quality or price in the prospective contract or any other terms of said prospective contract; or in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract; that the bidder/contractor has not paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma (or other entity) any money or other thing of value, either directly or indirectly in the procuring of the award of a contract pursuant to this bid.

Subscribed and sworn before this _____ day

of _____, 20 _____

(SEAL)

Firm: _____

My commission expires _____

Signed by: _____ Title: _____
(Manual Signature of Undersigned)

NOTARY PUBLIC (CLERK OR JUDGE)

Address: _____ Phone: _____

City: _____ State: _____

Zip: _____

Please mail sealed bids to:
Canadian County Clerk's Office
Attn: Purchasing
PO Box 458
El Reno, OK 73036

Street Address:
201 N Choctaw Avenue
El Reno, OK 73036

NOTE: Other terms and conditions can be added at the discretion of the county officers.



Canadian County
Purchasing

Bid Specifications

Date Issued: September 19, 2022

Bid Number: **2023-#03**

Closing Date: October 7, 2022 at 4:00pm

PO Box 458, 201 N. Choctaw Ave., El Reno, OK 73036

Opening Date: October 10, 2022 during the Commissioner's Meeting that begins at 9:00am

Commissioner's Meeting Room, 201 N. Choctaw Ave., El Reno, OK 73036

~ SPECIFICATIONS~

Computer Assisted Mass Appraisal (CAMA) System / County Assessor

Canadian County Assessor is seeking bids for Computer Assisted Mass Appraisal (CAMA) System.

SEE ATTACHED SPECS

For Information Contact:

Joel Foster, GIS Coordinator

Phone: (405) 295-6052

Hours: Monday – Friday 8:00am to 4:30pm

Address: 100 S. Rock Island, El Reno, OK 73036

If you have any questions or need additional information, please contact:

Lena Marquez, Purchasing Agent, 405.295.6125

lmarquez@okcana.cogov.net

201 N. Choctaw Avenue, El Reno, OK 73036

405.295.6125 ~ Fax 405.422.2437

www.canadiancounty.org



MATT WEHMULLER
CANADIAN COUNTY ASSESSOR

I. Introduction

The Assessor's Office for Canadian County, Oklahoma is seeking to obtain fixed price proposals from qualified solutions providers for a Computer Assisted Mass Appraisal (CAMA) system to assist the Assessor's Office in administering the office's responsibilities of the ad valorem taxation process. The Canadian County Assessor's Office has been using the Landmark CAMA system since 2009. All appraisal data and sales data are stored and maintained in the Landmark system. This data will need to be preserved and converted for use in any new CAMA system. All GIS data is stored in some format of ESRI's ArcGIS platform and is not maintained with Landmark and this is expected to continue after any transition to a new CAMA system. The Assessor's Office currently maintains a database of approximately 85,000 real and personal property accounts.

II. Scope of Services

Bids are expected to offer and detail the delivery of the following services and products:

- Full CAMA software package
- Conversion of as much existing CAMA data as possible to the proposed CAMA system
- Training for current Assessor's Office employees
- On-going assistance in maintaining compliance with the Constitution of the State of Oklahoma, statutes of the State of Oklahoma, and rules promulgated by the Ad Valorem Division of the Oklahoma Tax Commission
- Full package of reports required by the Ad Valorem Division of the Oklahoma Tax Commission
- Planning for each stage of the transition to the proposed CAMA system
- Documentation for the proposed CAMA system including manuals or user guides and system design and intended use
- Technical assistance with third-party software components required to use the proposed CAMA system
- On-going technical assistance integrating with third-party software or service providers such as Spatalest or Just Appraised and the Canadian County Treasurer's Office
- On-going support for the CAMA system including support for the system, updates to the system, or changes to the system required by changes in laws or regulations

The following items outline the Canadian County Assessor's Office requirements for a proposed new CAMA system. Any proposal should meet or exceed these requirements, or the bid must explain any exceptions where a requirement is not met.

A. CAMA System Valuation Requirements

1. Ability to value residential properties, commercial properties, and agricultural properties



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2. Ability to calculate values using the cost approach, sales comparison approach, or income approach to value
3. Ability to create or delete multiple valuations for one property or account so that any one property or account can have multiple buildings valued using different methods, multiple divisions of land valued using different methods, and/or multiple sets of personal property
4. Ability to integrate Marshall & Swift cost data
5. Ability to create or integrate multiple regression valuation models
6. Ability to override or correlate any valuation
7. Ability to record multiple exemptions for any single account and correctly apply exemptions, year over year valuation caps or freezes, freeport or five-year manufacturing exemption, and personal property penalties to assessments according to all relevant laws
 - Bidder must also be able to provide on-going assistance in configuring the CAMA system when changes to relevant laws require
8. Ability to value agricultural properties according to the methodology mandated by the Oklahoma Tax Commission
9. Ability to store and integrate into the overall valuation for the county all Public Utility properties as provided by the Oklahoma Tax Commission
10. Ability to incorporate personal property trend and depreciation tables from the Oklahoma Tax Commission as well as incorporate and calculate business personal property values using the square footage method approved by the Oklahoma Tax Commission

B. CAMA System Reporting Requirements

1. Ability to automatically fill and save or print the standard ad valorem forms mandated by the Oklahoma Tax Commission. The bidder must be able to provide on-going assistance in updating those forms or creating new forms when required
2. Ability to create and save or print reports that are required by the Oklahoma Tax Commission. The bidder must also be able to provide ongoing assistance in updating those reports when changes are made or in creating new reports when required
3. Ability for users to create user-defined reports without outside assistance

C. CAMA System Data Requirements

1. Ability to continue the Assessor's Office "account" numbering system inherited from the current CAMA system except for the leading digits
2. Ability to automatically assign a unique identifier to any record in any table and ability export those unique IDs or import updates based on those unique IDs
3. Ability to record a history for each property or account
4. Ability to retain and access data that has been retired or made inactive
5. Ability to store and modify separate tables of:
 - Neighborhoods or market areas



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- Subdivisions
 - Appraisal Zones
 - Taxing Entities
 - Tax Areas
 - Tax Increment Financing Districts
6. Ability to store or modify data on the situs city limit of any account regardless of the tax area
 7. Ability to store and assign North American Industry Classification System (NAICS) codes business personal property accounts
 8. Ability to create, store, and modify sketches of buildings or ability to integrate with commercially available sketching software
 9. Ability to attach or delete verbose notes, documents, pop-up alerts and pictures to specific accounts
 10. Ability to track changes made to any data by, at minimum, recording the user that made the change, the date and time of the change, and the data that was changed
 11. Ability to query data and save user-created queries for repeated use
 12. Ability to export data from the system in standard file formats and ability for users to create user-defined exports
 13. Ability to import data either to create new records or to update existing records en masse from standard ASCII, comma delimited, fixed width, Excel, or other common file types
 14. Ability to flag a property or account to prevent the owners name from being printed or shown on any publicly available material
 15. Ability to store and modify building permits received from municipalities
 16. Ability to store and modify user created flags or tasks that can be used in queries
 - Background – There is a need in current workflows to identify accounts that share a common characteristic or require certain actions in an open-ended way, that is new characteristics or flags can be created as needed. The current CAMA system does have “tasks” which are accessible in queries but must be assigned to a certain user and do not seem to be designed to be left permanently attached to an account but closed or removed after completion. Instead of using tasks, the Assessor’s Office has historically used the building permits to accomplish this task. Some examples of flags that are placed on accounts are:
 - a. Accounts needing a homestead application mailed
 - b. Accounts that need to be inspected or reappraised for new improvements for the next tax year
 - c. Accounts that need a review of land value for the next tax year
 - d. Accounts that were involve in the same natural disaster event
 - e. Accounts that contain wind turbines

D. Other CAMA System Requirements



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1. Ability to integrate and work with GIS data services from ArcGIS Enterprise or the ArcGIS environment including using GIS Data services for any mapping module included in the system and the ability for the ArcGIS environment to have at least read access to any tables comprising the CAMA system.
2. Utilize the Active Directory to manage users and access to the system or have a separate database for storing user information. Creating or deleting users and setting permissions must be able to be accomplished by county staff with no outside assistance
3. Capability of creating “public” users for use on publicly available computers in-office
4. Scalability of the system to accommodate storing new data and storing historical data

III. Bid Requirements

All bids submitted should contain one printed paper copy and a digital copy. Bids must have the required Canadian County Purchasing Office documents including:

- Invitation to Bid with total proposed cost on the total line
- Terms and Conditions completed and notarized

All bids submitted should also contain the following:

- Cover Letter
 - A cover letter should be submitted with all proposals containing contact information for the company of firm, a brief introduction, and an acceptance of the requirements of this request for proposals. The letter must be signed by an employee authorized to accept the requirements laid out in this request and will serve as confirmation of said acceptance.
- Qualifications, and Experience
 - Provide a statement of the qualifications and experience in providing products and services similar to this request
 - Provide details for the project team that would most likely perform the setup, conversion, and on-going support for this request including the structure of that team, planned roles for each project resource. Optionally, provide any personal qualifications, resumes, or curriculum vitae for those team members
 - Provide information on any contractors, consultants, or third-party organizations not directly employed by your firm that may be utilized in setup, conversion, or on-going maintenance
 - Describe the company’s approach to customer service and how you plan to interact with the Assessor’s Office. For example, provide what you think would be the best interval for sending updates to the county on the progress of the setup or conversion, how questions or concerns would be handled from either party, how changes in law requiring changes to the CAMA system might be addressed



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- Project Planning
 - Provide a project plan with proposed milestones and estimated time to complete those milestones for the following items. Also, include the tasks that would be the responsibility of Assessor's Office or its IT contractor
 - New CAMA system installation and setup
 - Conversion of current CAMA data to the new CAMA system
 - Training for Assessor's Office staff
 - Adoption of new CAMA system and "catch-up" on any data conversion
- Product Demonstration
 - Bidders should be prepared to offer an in-depth product demonstration for the proposed CAMA system. In an effort to expedite the process, the Assessor's Office will accept virtual demonstrations in lieu of in-person demonstrations

- Cost

Provide a detailing of the costs for the Scope of Work. Costs should be itemized in such a way the Assessor's Office would be able to reasonably predict changes in cost that would occur if a change in any resulting contract is made. Costs should be broken out, at minimum, by the following divisions:

- CAMA system installation and setup
- Data conversion
- Training
- On-going licensing and maintenance

- References
 - Provide at least three references of clients for which the company recently performed similar work
 - It is preferred that at least one reference be for a client in Oklahoma

IV. Bid Evaluation

Bids will be evaluated using the following criteria:

- Experience of the bidder in providing similar products and services to other clients
 - Experience of bidder working with clients in Oklahoma
- Overall effectiveness of the proposed CAMA system including:
 - Adherence to the requirements outlined in the Scope of Work section
 - Ease of use of proposed CAMA system
- Overall cost for setup and conversion
- Overall predicted cost for on-going licensing and maintenance



Date Issued: September 19, 2022
Bid Number: **2023-#03**
Closing Date: October 7, 2022 at 4:00pm
PO Box 458, 201 N. Choctaw Ave., El Reno, OK 73036
Opening Date: October 10, 2022 during the Commissioner's Meeting that begins at 9:00am
Commissioner's Meeting Room, 201 N. Choctaw Ave., El Reno, OK 73036

**TO HELP PREVENT BIDS FROM BEING REJECTED FOR LACK OF COMPLETION
PLEASE CHECK FOR THE FOLLOWING:**

Is the Invitation to Bid Signed and Notarized? _____

Are all applicable spaces filled in? _____

Are all necessary papers enclosed? _____

Is the Bid # and Closing Date on outside of return envelope? _____

*Electronic submission is an option for submitting a bid. Available at:

<https://www.bidexpress.com/businesses/52814/home>

Thank You,

Lena Marquez, Purchasing Agent



**Canadian County
Purchasing**

ELECTRONIC BIDDING MEMO
CHANGES TO SUBMISSION PROCEDURES

Canadian County is excited to announce we are providing electronic bidding as an option for this solicitation via the Bid Express[®] service at www.bidexpress.com.

You can access our Bid Express public home page at:

<https://www.bidexpress.com/businesses/52814/home>

Contact Information

Purchasing Agent: Lena Marquez

Phone Number: 405-295-6125

E-mail: lmarquez@okcana.cogov.net



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~ AFFIDAVIT ~

Computer Assisted Mass Appraisal (CAMA) System / County Assessor

State of Oklahoma)
County of Canadian) §

I, Lena Marquez, Purchasing Agent, in and for said County and State, do hereby certify that "Invitations to Bid" were sent to the following:

Bid Clerk
projects@bidclerk.com

Bid News
projects@isqft.com

ePlan
4115 South Providence, Ste. 105
Columbia, MO 65203

Online Data Services
3295 River Exchange Dr, Ste 213
Norcross, GA 30092

ACT
14 Office Park Dr.
Suite 100
Little Rock, AR 72211

Apprentice Information Systems
900 N. Dixieland
Suite 102
Rogers, AR 72756

Harris Govern
760 N. Watters Rd
Suite 100
Allen, TX 75013

Landmark GSI
5688 W 580
Chouteau, OK 74337

Patriot Properties
123 Pleasant St.
Suite 201
Marblehead, MA 01945

Tyler Technologies
5101 Tennyson Parkway
Plano, TX 75024

Witness my hand and seal this 19th day of September, 2022.


Lena Marquez, Purchasing Agent
(SEAL)

