



RENSSELAER COUNTY BUREAU OF CENTRAL SERVICES

STEVEN F. McLAUGHLIN
COUNTY EXECUTIVE

JAMES R. GORDON
DIRECTOR

REQUEST FOR PROPOSAL

DELINQUENT PROPERTY TAX SOFTWARE/MAINTENANCE – RENSSELAER COUNTY BUREAU OF FINANCE

SEALED PROPOSALS WILL BE RECEIVED AT THE OFFICE OF THE DIRECTOR, BUREAU OF CENTRAL SERVICES, 5TH FLOOR, MAIN OFFICE BUILDING, NED PATTISON RENSSELAER COUNTY GOVERNMENT CENTER, 1600 SEVENTH AVENUE, TROY, NEW YORK UNTIL:

FOUR (4:00 P.M.), TUESDAY, APRIL 12, 2022

JAMES R. GORDON, DIRECTOR
BUREAU OF CENTRAL SERVICES
1600 SEVENTH AVENUE, 5TH FLOOR
TROY, NEW YORK 12180

RFP-22-26
DATED: March 8, 2022
PAGE: 1

PURPOSE

The purpose of this RFP is to obtain proposals for securing the installation, implementation, support and maintenance services of a qualified firm to replace the existing Tax Collection and Payment software for Rensselaer County.

SCOPE OF SERVICES

Rensselaer County is seeking to replace its in-house access database Delinquent Property Tax collection software. We will require a delinquent tax collection application, demonstrations of software, extensive implementation and consultative services, data conversion, pre-configured reports and sufficient training and support to ensure the project is successful.

Questions: – Inquiries concerning the request for proposals may be made to: Mark Wojcik, CFO, Rensselaer County Bureau of Finance, 1600 Seventh Avenue, 4th Floor, Troy, New York 12180, Office Phone: 518-270-2748, Email Address: mwojcik@rensco.com.

Required Applications & Services

Tax Collection and Revenue Reconciliation

The proposed tax collection software must provide for, but not limited to acceptance of payments (cashiering), compliance with Real Property Tax Law (RPTL) Articles 10 and 11 provisions and subsequent changes thereof, local law provisions, re-levy of school and village taxes, bankruptcies, withdrawals, and other provisions for collection of delinquent property taxes as needed. The proposed software must designate and update designation of parcels (due to the age of delinquent taxes and RPTL Article 11) automatically: open, list, petition, withdrawn, bankrupt and deed properties.

Rensselaer County requires the ability of the proposed software to integrate with the Tyler New World ERP financial management system accounting revenue and balance sheet account codes.

Delinquent Tax Collection

After towns and villages have collected taxes for 3 months, delinquent accounts are turned over to County Finance for collection. Simplified import of data from towns and villages is required for the Finance office to import tax data from local tax collectors with various software, and begin the delinquent tax collection process.

Data Conversion for historical data

Vendor must convert all current and historical data from the County's current Delinquent Property Tax software system. The conversion of data files from the County's current system must be made to coincide with implementation of the proposed Tax Software solution. The conversion must be done without down-time or loss of data.

Required Abilities of Delinquent Tax System

Unpaid Tax Screen:

- Display multiple years of unpaid taxes
- Produce bills for whatever month requested (interest rates are loaded to the system as each unpaid tax year is returned to the County)
- Enter new owners as new deeds are recorded
- Enter new addresses of the owners-separate field as NYSRPTL requires bills to go to the address on record for the delinquent tax year and any new addresses/owners as well
- Import/export RPS files and data
- Enter tax payments and paid dates in system daily
- Area to add notes (such as payment returned due to incorrect amount, check not signed, etc.)
- Ability to reverse payments for NSF, processing errors, etc.
- Add In-Rem fees to statements when applicable
- System set up to pay current taxes prior to past years, but must have the ability to override if necessary
- Ability to flag for bankruptcies, county-owned properties, and cancellations to avoid letters being generated
- Track/apply bankruptcy payments.
- Correct returned tax amount for corrected bills and or apportionments

Reporting Ability:

- Monthly tax payment reports-filed in the County Clerk's office along with a "Certificate of Redemption", as required by NYS RPTL and ability to export reports to Excel and Tyler New World ERP Financial Management System
- Generate letters at any given time to send to property owners reminding them of their unpaid taxes to the County Finance Office. Letter provides a grand total of all years unpaid with two sets of figures to redeem (i.e. sent in April, will provide April and May figures)
- Capability to send to two addresses-original and new owner if applicable.
- Verification when the new tax is loaded, that all names appear on the List of Delinquent Taxes, as required by law.
- Generate Advance Notice of Foreclosure, pursuant to NYS RPTL (in September).
- Generate List of Delinquent Taxes, pursuant to NYS RPTL, which gets recorded in the County Clerk's Office, County Attorney's Office, with a copy mailed to NY State.
- Ability to extract information fields from a particular tax year to create ad hoc reports (i.e.: Name, address, classification, acreage, property location)

Reporting Ability Continued:

- Create reports by a specific year and with specific information (i.e.: Tax year 2021 with town, tax map number, name of assessed owner, location property classification, etc.)
- In Rem reporting to include parcel description, owner and lienholders, payment tracking and the ability to generate word documents with foreclosed property details
- Produce advertising information for List, Petition, and Deed parcels, to be used by newspapers for publication, currently downloaded and e-mailed.

Production of Required Lists:

- Lists for legal advertising for tax enforcement notifications, the Public Auction Brochure, and to prepare deeds to the County.
- Generated for NYS to identify any parcels they may wish to acquire for State lands in the forest preserve.
- Letters for all foreclosure eligible properties that are mailed to the Building Inspectors in each town to verify any hazards that may exist. Also provide a list for NY State, and the county Health Department to review for possible environmental hazards.
- All “parties to be notified” section for each delinquent property-the information comes from a title search and is entered into the unpaid tax system so that the properties the become eligible for tax foreclosure:
 - Generate Tax Enforcement Notifications.
 - Generate mailing labels for the certified mailings.
 - Notifications contain amounts necessary to redeem the parcels (calculated from the unpaid tax screen). Figures for three consecutive months.
- Listing of particular year with assessed name, property location, classification and acreage.

Demonstration of Software:

- Rensselaer County will require each responder to provide a demonstration of their proposed software.

Proposed Application Software and Computing Environment:

Proposers must present in detail, features and capabilities of the proposed software, including but not limited to:

- Hardware Environment. Describe the hardware environment required to utilize the proposed software. List any certified hardware recommended for the proposed software.

Proposed Application Software and Computing Environment Continued:

- Operating System. Identify the operating system required by the proposed applications software and database management system in the hardware environment recommended above.
- List the operating system software support products required to support the recommended computing environment. List any additional software products required to support the proposed software package.

Installation and Implementation Requirements:

- Responder will detail how they will assist Rensselaer County IT staff with the installation of the software.
- Responder will detail how they will train Rensselaer County technical staff and user community on the use and administration of the Software.

Support/Maintenance:

- Proposal must include at least one year of support and maintenance.
- Responder must include a copy of their standard on-going customer support and maintenance contract with their submission along with variations/enhancements that may apply.

TERM

The County anticipates that the initial term of the Contract will be five (5) years plus such period of time that includes the actual period of time necessary for installation and acceptance testing necessary to achieve Final Acceptance and completion of the Warranty Period. Vendor and County shall amend the Contract as needed to amend the initial term of the Contract once the delivered software solution achieves Final Acceptance. The County reserves the right to renew or extend the Contract for up to five (5) additional periods of one (1) year each at the sole option of the County for purposes of licensing and maintenance of the software solution, which renewals or extensions will be under all terms and conditions of the RFP and the original Contract. Alternative terms may be considered at the discretion of the County depending on the software solution's useful life.

SUBMITTAL CONTENT AND FORMAT

In order for the County to conduct a uniform review process of all proposals, proposals must be submitted in the format set forth below. Failure to follow this format may be cause for rejection of the proposal because adherence to this format is critical for the County's evaluation process:

SECTION I: TITLE PAGE

Showing RFP number, closing date and time, responder's name, address, telephone and fax number of the company. Responder must also clearly identify the name(s) of the contact person responsible for inquiries regarding the RFP submission and the person responsible to bind the company contractually. Along with the names of these individuals, responder must provide their phone and fax numbers and email address for each.

Table of Contents- The Table of Contents must indicate the material included in the proposal by section and page number.

SECTION II: QUALIFICATIONS AND EXPERIENCE

Each responder will provide the history of their company, describe their professional qualifications, prior experience in similar projects, demonstrated capabilities, including demonstrated ability to work effectively with other service and system providers (e.g., County government), history of regulatory compliance, fiscal solvency and budget performance; contract compliance; accuracy and timeliness of reporting; management structure and ability to support projects of this scope; ability to recruit and retain staff; and commitment to staff development.

Provide examples of how changes implemented to other programs managed by the company improved operations and resulted in cost savings.

Identify all personnel assigned to the project. (Attach resumes)

Provide a minimum of three (3) references, for similar projects completed. Include contact name, telephone number, date of contract, dollar value of contract and brief description of the program. Specific emphasis should be placed on similar work performed in the previous five years.

SECTION III: PROPOSED PLAN

In a narrative format, describe in detail how the program will be structured explaining how each of the requirements of the Scope of Work and other tasks will be accomplished. Include any other additional services, enhancements and/or options that will be provided to the County.

Explain what steps will be necessary to implement services.

Describe what information will be provided to the County effectively capturing required data. Attach samples of all reports to be used.

SECTION III: PROPOSED PLAN Continued:

Describe the plan to work with the County.

Detail methods to be employed which will result in cost savings for the County. Give examples and where possible provide a realistic estimate cost savings.

Include any additional services or information seen beneficial to this program that the evaluation committee should consider.

SECTION IV: FEE/COST PROPOSAL

Cost Proposal – Three (3) copies of the firms Total Fee/Cost Proposals will be submitted. The cost schedule supplied will include all items of labor, materials, travel, equipment and other costs necessary to fully provide the service. Proposers must use the cost quotation sheet in Appendix A. Proposers may include items not specified that they consider pertinent. All such alternatives shall be listed separate from the proposal and shall be itemized.

The responder's name must appear on Appendix A, B and separately listed alternatives of the cost proposal sheets.

SECTION V: RETURN DOCUMENTS

Three (3) complete copies of the firm's proposal shall be submitted and signed including the Local Law #2 form as indicated at the end of this RFP document no later than Four (4:00) p.m., Tuesday, April 12, 2022 to the Attention of James R. Gordon, Director, Bureau of Central Services, 1600 Seventh Avenue, 5th Floor, Troy, New York 12180 and shall be labeled as RFP-22-26 Delinquent Property Tax Software/Maintenance – electronically submitted or faxed proposals will not be accepted. Any Proposals received after date and time will not be considered. It is each Proposer's responsibility to assure that proposals are shipped in a timely fashion so as to be received by the designated party on or before the due date. We accept no responsibility for lost and/or late delivery of proposals.

5.0 **EVALUATION CRITERIA**

Only those proposals that contain complete information and required certifications will be considered. All proposals will be evaluated and examined by a committee of Rensselaer County representatives using multiple criteria. The project may be awarded to a qualified responder that, based on the committee's evaluation, submits the proposal that best meets the County's needs.

The submitted proposals will be evaluated based on the following criteria:

- **OVERALL PLAN TO PROVIDE REQUIRED SERVICES (35 Points)**
 - Completeness of responder's proposed plan to provide Delinquent Tax Collection & Payment Software.
 - Demonstrated capability of the responder to satisfactorily meet not only the requirements outlined in this document but all necessary phases of the program.
 - Plan to accomplish all required tasks.

- **FEE/PRICING PROPOSAL (25 Points)**
 - Cost of proposal
 - Reasonableness of fees and budget
 - Reasonableness of optional fees

- **QUALIFICATIONS AND EXPERIENCE (20 Points)**
 - Responder's experience with projects of similar size and scope
 - Personnel qualifications and experience
 - Responder's business history and viability
 - References

- **PERFORMANCE OF PROPOSED SOFTWARE (20 Points)**
 - Demonstrated performance of the proposed software, software maintenance, updating, and ongoing technical support

6.0 **QUALIFICATION OF RESPONDENT**

Each responder shall provide a statement of qualifications as required by these specifications. Rensselaer County may make such investigations it deems necessary to determine the ability of the responder to perform the work. The responder shall furnish to the County, within five (5) days of a request, all such information and data for this purpose as may be requested. The County reserves the right to reject any proposal if the information submitted by, or investigation of, such responder fails to satisfy the County that such responder is properly qualified to carry out the obligations set forth in this RFP and/or the resulting contract and to complete the work contemplated therein. Conditional proposals will not be accepted.

APPENDIX A

COST QUOTATION SHEET

Software Cost

	Installation	Software	Implementation	Total Module
Delinquent Tax System	\$	\$	\$	\$

Service Costs

Service:	Cost
Interface of Real Property Tax System (RPS)	\$
Data Conversion	
Technical Support Training	
User Training	
Total Service Costs	\$

Maintenance Costs

Software Maintenance and Support		
Warranty – Year One		\$ No Cost
Year Two		
Year Three		
Year Four		
Year Five		
Year Six		
Year Seven		
Year Eight		
Year Nine		
Year Ten		
Total Maintenance and Support Total		\$

APPENDIX A (Continued):

COST QUOTATION SHEET

Hardware Costs

Recommended Hardware (list equipment separately on lines below; add additional sheet if necessary)		
		\$
Total Hardware Costs		\$

TOTAL COST PROPOSAL

Software cost		\$
Service cost		
Maintenance cost		
Hardware cost		
TOTAL PROPOSAL COST		\$

Name _____ **Federal Tax ID #** _____

Address _____ **City** _____ **State** _____ **Zip** _____

Authorized Signature _____ **Print Name** _____

Date _____ **Phone** _____ **Fax** _____

Email _____

RETURN WITH PROPOSAL

APPENDIX B

The following information is provided to assist proposers in developing their response to this RFP. All figures are an annual approximation.

Annual number of accounts turned over each April	1,525
Average number of in-rems annually	300
Number of current bankruptcies	105
Number of tax bills generated monthly for mailing minimum to maximum range	900 – 2500

Local governments

Towns	13	School Districts	13
Cities	2	City School Districts	2
Villages	6		

School district taxes are turned over to the County by November 15th for collection during the month of November ONLY. County collection begins November 1st based on original data files received in September. 2% school penalty and 7% county penalty is added. No postmarks accepted.

Delinquents are re-levied by the county's Tax Services department in the month of December and added to the next Town & County Property Tax bill.

Name		Federal Tax ID #	
Address		City	State
			Zip
Authorized Signature		Print Name	
Date	Phone	Fax	
Email			

RETURN WITH PROPOSAL

DUE TO THE BUREAU OF FINANCE UPON NOTICE OF CONTRACT AWARD:

**County of Rensselaer
Insurance Requirements**

INDEPENDENT CONTRACTORS REQUIRED COVERAGE:

The amounts of insurance coverage to be provided shall not be less than the limits shown herein. Duplicate copies of Insurance Certificates shall be furnished along with insurance company statements that contractor has paid insurance premiums. All insurance carriers must have a best rating of an A or better.

A. Workmen's Compensation

Section A - Employee Benefits	Statutory
Section B - Employers Liability	Statutory

B. New York State Disability Benefits Statutory

C. Commercial General Liability including products/completed operations:

\$1,000,000	General Aggregate
\$1,000,000	Products-Completed Operations Aggregate
\$1,000,000	Personal Injury and Advertising Liability
\$1,000,000	Each Occurrence
\$ 500,000	Fire Damage (any one fire)
\$ 10,000	Medical Expense (any one person)

The Commercial Comprehensive General Liability policy shall include coverage for acts of **all** Contractors, sub-contractors and sub-contractors for **all** liability assumed under this contract and where applicable, coverage for use of explosives, collapse of buildings and damage to underground properties (X, C & U Coverage), and coverage required by any Law or Municipal Ordinance or Regulations.

D. Comprehensive Automobile Liability, including contractual hired car and non-owned vehicle coverage:

\$1,000,000 Combined Single Limit - Bodily Injury and Property Damage

E. Owner's and Contractors Protective Policy:

The Contractor shall take out and maintain during the life of this Contract such contingent property damage and public liability insurance policies, in described amounts as will protect the County of Rensselaer, its officers and agents as follows:

I) Certificate Holder: County of Rensselaer
Attn: Rensselaer County Attorney
Ned Pattison Rensselaer County
Government Center
1600 Seventh Avenue
Troy, New York 12180

**County of Rensselaer
Insurance Requirements (Cont'd)**

- II) Limit of Liability
 \$1,000,000 Each Occurrence / General Aggregate

The original Owner's Protective Policy shall be furnished to the County of Rensselaer.

F. Umbrella Liability

Limit of Liability (minimum limits)
\$2,000,000 each occurrence / \$2,000,000 aggregate * (where applicable) excess of Commercial General Liability, Commercial Automobile and Workers Compensation Employers' Liability coverages.

G. Other Requirements

The Insurance Certificate shall contain the following:

- A) A description of the work and contract authorization number.
- B) Reference to any special endorsements restricting standard policy coverage.
- C) A statement that the insurance company will provide 60 days written notice to the County of Rensselaer prior to any modifications or cancellations of any such policy by registered mail or return receipt.
- D) County of Rensselaer and/or any of their employees, officers or agents are named as additional insured with respects to the referenced contract.

All required insurance must be in effect and continued so during the life of the Contract, at the Contractor's expense, and is subject to the approval of Counsel as to adequacy, form and correctness. No approval to begin work shall be given to the Contractor until submission and approval of proper insurance certificates and original Owner's and Contractors Protective Policy.

For additional questions regarding insurance requirements please contact the Rensselaer County Attorney's Office at (518) 270-2950.

*With regard to Aggregate

**LOCAL LAW #2, 1992
CERTIFICATION of COMPLIANCE**

Local Law No. 2 for the Year 1992, adopted by the County of Rensselaer and effective as of September 1, 1992, provided for certain changes to the County's Code of Ethics, adopted originally in 1989. One of the changes provided for by the 1992 legislation affects those persons and entities who wish to do business with the County of Rensselaer and Hudson Valley Community College. In substance, the Code of Ethics, as amended, provides as follows:

"No elected public official or family member hereof, nor any partnership [or] unincorporated association in which he or she is a member or employee or in which he or she has a proprietary interest, nor any business or professional corporation of which he or she is an officer, director or legally or beneficially owns or controls more than five percent of the outstanding stock, shall have business dealings with Rensselaer County or any of its boards, agencies, commissions, authorities, districts and Hudson Valley Community College. For purposes of this subdivision, business dealings shall include contracts with Rensselaer County, its boards, agencies, commissions, authorities, districts and Hudson Valley Community College, gained through competitive bidding."

For the purposes of the above section, the term "family member" means "...a spouse, child, step-child, brother, sister parent, or dependent of Rensselaer County officer, employee, public official and party officers."

Should you have any questions concerning the foregoing, you should feel free to contact the Office of the Rensselaer County Attorney, located at the Ned Pattison Rensselaer County Government Center, 1600 Seventh Avenue, Troy, New York 12180, either in writing or by telephone. The telephone number for the County Attorney's office is (518) 270-2950. Their facsimile number is (518) 270-2922.

STATE OF NEW YORK

COUNTY OF RENSSELAER

The undersigned vendor/bidder hereby certifies and affirms to the County of Rensselaer, New York that it has reviewed the pertinent provisions of Local Law No. 2 of the Year 1992 for the County of Rensselaer, New York and that the undersigned vendor/bidder is not in violation of those provisions pertaining to business dealings with the County of Rensselaer.

- PRINT or TYPE ALL INFORMATION except "SIGNATURE" -

(Name of Vendor/Company)

(Person authorized to sign & Title)

(Street or Box Number)

(City, State, Zip Code)

_____ /_____/_____
(Signature)

SUBMIT THIS FORM WITH YOUR PROPOSAL