

**T****HE CITY OF WINNIPEG**

**FORM 4: RFP RESPONSE SUBMISSION**

 RFQ No. 486-2023

 Computer Assisted Mass Appraisal (CAMA) Solution

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1. Purpose of Document

This document provides a template to respond to the sections of the City of Winnipeg RFP (#486-2023). It provides each Proponent an opportunity to submit their proposed Solution, demonstrate their capabilities and experiences, and demonstrate how they meet business needs of the City of Winnipeg.

Please complete the “Proponent response” portion for each question/requirement. Please remain within the page limits specified under each section. Please refer to the RFP document for references.

1. Letter of Introduction

Please provide a letter of introduction signed by an officer of the Proponent organization authorized to legally bind the Proponent. The letter should introduce the firm, state their intent to provide the products and/or services required by the City of Winnipeg.

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| **Letter of Introduction** | **Page Limit: 1** |
| Proponent response: |

1. Form 1 – Self Assessment - Functional Requirements (Section C)

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| **Functional Requirements – Self Assessment (Weighting – 10%)** | **Page Limit: N/A** |
| Please refer to attachment: **486-2023\_Form 1 - Self Assessment - Functional Requirements** and provide your responses against each line item based on your capability to meet the CAMA requirements. |

1. Form 2 - Self Assessment - Non-functional Requirements (Section D)

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| **Non-Functional Requirements – Self Assessment (Weighting – 4%)** | **Page Limit: N/A** |
| Please refer to attachment: **486-2023\_Form 2 - Self Assessment - Non-functional Requirements** and provide your responses against each line item based on your capability to meet the CAMA requirements. |

1. Form 3 - Self Assessment - Architecture Requirements (Section E)

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| **Architecture – Self Assessment (Weighting – 4%)** | **Page Limit: N/A** |
| Please refer to attachment: **486-2023\_Form 3 - Self Assessment - Architecture Requirements** and provide your responses against each line item based on your capability to meet the CAMA requirements. |

1. RFP Response Submission
	1. **Experience and capacity (Weighting 7%)**

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| **Company Profile** | **Page Limit: 6-10** |
| **Requirements:** The City of Winnipeg’s Assessment and Taxation Department seeks the services of an established legal entity, in operation, and with an excellent financial and legal standing.**Response Guidelines:** Proponents are requested to provide a narrative description of their organization with, at a minimum, the following in its response: 1. A brief description of the Proponent organization, including legal entity type, when established, head office and other locations, number of employees (full-time, part-time).
2. Proponent’s organizational chart, identifying the key contact for the submitted offer.
3. An indication as to whether the Proponent has been acquired or acquired any other organization in the past two (2) years and, if yes, when the acquisition took place.
4. A description of the software service offerings of the Proponent organization.
5. The relationship of the Proponent organization to any other organization(s) to be involved in providing the deliverables, including reference to any pertinent legal agreements.
6. A description of the financial standing of the organization.
7. A listing of all known open or pending legal matters or other issues where the Proponent is a party that may have a material or ability to deliver impact in the next five (5) years.
8. Full disclosure of any past cancelled or terminated contracts, in the past five (5) years.
9. Full disclosure of any criminal or civil offense.
10. Full disclosure of any potential conflict of interest between the Proponent and any The City of Winnipeg employee who functions or has responsibilities in the review or approval of the undertaking or carrying out of the Contract.
11. A statement of whether, in the last five (5) years, the Proponent has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors.
12. A statement of whether there are pending or in-progress Securities Commission investigations involving the Proponent, and if so, an attached opinion of counsel as to whether these may impair Proponent performance in a Contract under this RFP.
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| Proponent response: |

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| **CAMA Experience** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should have the legal authority to offer the proposed core CAMA software service(s) in helping clients and the industry advance the use of CAMA to deliver quality property valuations in innovative ways.**Response Guidelines:** Proponents are requested to provide a clear narrative description of their CAMA experience with, at a minimum, the following in its response: 1. The relationship of Proponent organization to the proposed Solution service(s) [e.g., as intellectual property owner, as authorized Solution implementer, including their legal authority to offer the proposed Solution*.*
2. The Proponent organization’s knowledge, expertise, and skills with CAMA, including:
	* Any specialization(s) the Proponent organization has, where the Proponent will be able to provide industry best practice experience that may enhance the City’s property valuations, service delivery and program management.
	* Any major gaps the Proponent knowledge, expertise, and skills with CAMA.
3. An indication of key risk(s) to be mitigated pertinent to transition to a modern CAMA.
4. The number of CAMA clients the Proponent organization has, by software service offering.
5. An overview of the CAMA Solution proposed for City of Winnipeg with:
	* Its history (e.g., date first offered, key evolution milestones).
	* Retention statistics, with number of implementations (#’s of implementations, #’s retained, # of implementations in-progress), and the approximate number of parcels and total assessed values supported for each implementation.
	* An indication that the proposed CAMA Solution is commercially available CAMA Solution and has been available in the marketplace.
	* An indication that the Proponent has implemented the proposed CAMA Solution recommended for the City in at least 2 client sites.
6. The Proponent organization’s contribution to CAMA modernization – such as, with industry governance frameworks and standards, ground-breaking CAMA projects, and / or outcomes achieved by combining state-of-the-art valuation, GIS, analytics, modeling, and tools.
7. Any professional or industry certifications relating to CAMA experience.
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| Proponent response: |

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| **Field Device Software Experience** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should have demonstrated experience in optimizing and delivering software Solutions for secure use on field devices (e.g., tablets, notebooks) by staff performing inspections at property locations and managing their work in the field, with field Solution features such as:* Check out and remote / disconnected access to property or other client records that may need to be used (viewed, updated) in the field.
* Remote connected or disconnected seamless access to a cohesive set of tools required for onsite data collection (e.g., CAMA, sketch, and GIS), data quality controls, and worker safety.
* Check in and synchronization of records with the “connected” comprehensive Solution (e.g., property administrative and valuation capabilities) and update of activity status for specific instances of property valuation and / or work management workflows.

**Response Guidelines:** Proponents are requested to provide a narrative description of their experience in optimizing and delivering software Solutions for field devices used for property assessment with, at a minimum, the following in its response: 1. A clear description of the Proponent organization’s knowledge, expertise, and skills in delivering software Solutions (e.g., for Property Assessment) on field devices, with record checkout capability, ability to gather data and access required tools in a disconnected mode, and ability to synchronize / check in updated records, including:
	* Any specialization(s) that the Proponent organization has in the area of field device software Solutioning, where the Proponent will be able to provide industry best – practice experience that may enhance the City’s property valuations, service delivery and program management.
	* Any gaps the Proponent has in knowledge, experience, and skills in software Solutions on field devices.
2. Organizational references\* from a minimum of two (2) jurisdictions where the Proponent implemented field device software with check out, check in and synchronization features, as identified in the requirements (above). The following data should be supplied for each reference: jurisdiction name, parcel count, contact name, title, phone number, email address, date reference contract signed, date field device Solution was implemented, Proponent role.

***\*Note:*** *The City of Winnipeg reserves the right to contact any reference for validation of content at any point during the RFP process. As such, all references should be willing to be contacted. If any information received during these reference calls deems any aspect of the proposal to be inaccurate, misleading, or contradictory to the information provided in the Proponents proposal, the City of Winnipeg has the right to investigate and reflect learnings in the scoring.* |
| Proponent response: |

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| **Solution Implementation Experience** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should have experience implementing CAMA Solutions, specializing in guiding client’s transition, ensuring that the end-to-end Solution functions seamlessly, using proven methods and experience, with strong leadership and a stable roster of well-trained and highly experienced Solution integration specialists, experienced in implementing CAMA Solution for a minimum of two (2) clients (for proposed Solution). ​**Response Guidelines:** Proponents are requested to provide a narrative description of their implementation experience with, at a minimum, the following in its response: 1. The Proponent organization’s knowledge, experience, and skills in implementing CAMA Solution relevant to the deliverables of this RFP.
2. An indication of key risk(s) to be mitigated pertinent to transition.
3. A list of client Solutions the Proponent organization has implemented, indicating for each the product(s) implemented, date of full implementation, length of implementation project, whether implemented as single-tenant or multi-tenant cloud, Proponent role, current service status (in use, ceased use of implemented services).
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| Proponent response: |

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| **Resource Plan, with Quality Resources** | **Page Limit: 16-30** |
| **Requirements:** The Proponent should implement and support the new Solution with a sound resource plan, a highly experienced team, with the appropriate numbers and types of resources to reasonably deliver the project scope with quality and within the proposed release schedule.**Response Guidelines:** Proponents are requested to provide a narrative description of their resource plan and proposed resources with, at a minimum, the following in its response: 1. Resource plan, indicating:
	* Resource roles required over contract with number of resources required, by role, with assignment time frame, indicating if resource is for implementation or support.
	* Resource assignments (first 2 years) – for each role required in first 2 years of plan, indicate assigned resource name, assigned time frame, and if full-time or part-time assignment.
2. Key resource profiles - for each of the following resource types:
	* Certified Project Manager – additionally, indicate any recognized project manager certification(s) held (e.g., Project Management Professional - PMP).
	* Certified Solution Architect / Technical Lead – additionally, indicate any recognized architect certifications held.
	* Certified Functional Lead / Analyst – additionally, indicate any recognized functional or business analyst certification (e.g., Certified Business Analysis Professional - CBAP).

Provide a brief overview of background of assigned individual (years of experience, roles, project types, organizations).* + 1. Demonstrate a minimum of two projects / assignments in that role.
		2. Indicate their relationship to the Proponent organization (e.g., employee, contractor).
		3. Indicate their experience with CAMA and CAMA modernization.
		4. Indicate their change management experience.
		5. Indicate their experience with public sector Solution implementations.
		6. Indicate relevant Solution delivery certification(s) held (e.g., Agile Scrum).
		7. Two (2) references from a client organization where the resource was assigned in a similar role – with contact organization, name, phone, email, position.
1. Provide a detail strategy to replace Proponent personnel who may not be performing in accordance with the requirements within the RFP or may resign during the Contract term.
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| Proponent response: |

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| **References** | **Page Limit: 6** |
| Organizational references from three (3) jurisdictions where the Proponent has implemented CAMA software services in the past five (5) years, preferably for parcel sizes close to the City. The following should be supplied: jurisdiction name, parcel count, contact name, title, phone number, email address, date reference contract signed, date fully implemented, contract price, CAMA and other services implemented, Proponent role.***\*Note****: The City of Winnipeg reserves the right to contact any reference for validation of content at any point during the RFP process. As such, all references should be willing to be contacted. If any information received during these reference calls deems any aspect of the proposal to be inaccurate, misleading, or contradictory to the information provided in the Proponent’s proposal, City of Winnipeg has the right to investigate and reflect learnings in the scoring.* |
| Proponent response:**Reference 1:****Reference 2:****Reference 3:** |

* 1. **Solution Approach - (Weighting - 5%)**

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| **Solution Narrative** | **Page Limit: 8-12** |
| **Requirements:** The Proponent should deliver a modern, well-architected, holistic, cohesive, and secure Solution with seamless access to all capabilities the City needs and with continual enhancement in response to opportunities, needs, strategic objectives, and priorities.**Response Guidelines:** Proponents are requested to provide a clear narrative description of their proposed Solution with, at a minimum, the following in its response: * + - * 1. How the Proponent’s Solution meets or exceeds all requirements of this RFP, highlighting how the proposed Solution is the right-fit and provides value for money for the City, identifying its primary benefits and expected value to be realized, while noting any key gaps in the base product and how these will be addressed during the project.
				2. An overview of the five-year strategic roadmap for the Proponent’s CAMA Solution.
				3. Identify each software or platform service offering (with module, as applicable) proposed to satisfy all requirements of the RFP. Proposed service offerings (modules) may be of three types:

Proponent Solution offering (e.g., a CAMA service offering).Third-party software services which the Proponent will tightly integrate with the proposed Solution.Other third-party software services (to be delivered by the Proponent), which represent preferred or recommended services that the Proponent will cost and deliver as part of their proposal and tightly integrate with the proposed Solution.* + - * 1. Minimum specifications for devices to use Proponent’s software services:

Desktops / laptops - for internal users accessing Solution in fully connected mode. Field devices – for assessors to use of field version of software services.* + - * 1. An overview of primary standards and methods that underpin their base CAMA product, including standard techniques recommended to undertake client configurations, extensions, integration, security and privacy protection, particularly noting how the City data, configurations, user management, and unique functionality will be kept logically isolated, secure, and private.
				2. Details about the physical security protecting the data centers and facilities that will house the enterprise's data and information.
				3. Disclose the city(ies) of data centres that will be storing data for the City.
				4. The Proponent’s privacy policy published security and privacy breach disclosure policy, and processes.
				5. The Proponent’s published screening and hiring practices for employees who access enterprise data and user information.
				6. Demonstrate cybersecurity program maturity by describing how their Solution will address/addresses NIST Cybersecurity Framework.
				7. Indicate if a standard terms of engagement for application security testers exists and, if so, proponent is requested to provide it.
				8. Describe any value add that will be available to the City that is not otherwise described in the RFP, particularly in the form of software features that could deliver benefit to property assessment service delivery or program management.
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| Proponent response: |

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| **Implementation Schedule and Scope** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should implement the Solution following the release schedule and scope established by the contract from this RFP. The City prefers a staged implementation, in order to gain business value early and often and to mitigate risk. **Response Guidelines:** Proponents are requested to share release schedule:Based on the Proponent’s Solution and experience in CAMA implementations, Proponents are requested to provide a clear narrative description of their proposed implementation schedule and scope with, at a minimum, the following in its response: 1. Identify the Proponent’s proposed release schedule, including start date, end date, elapsed time for each release; Go-Live dates; scope for each release (with reference to benefits / value per release and risk).
2. A diagram of Proponent proposed release schedule.
3. Assumptions made by the Proponent in their proposed release schedule and scope, including (but not limited to) required inputs, resources, or other support or dependencies from the City.
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| Proponent response: |

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| **Delivery Methods and Management** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should use established Solution delivery methods (e.g., Waterfall, Staged / Agile) to manage Solution implementation and meet defined scope, with high quality and effective risk management, and within established timelines and budget. The Proponent should work in a seamless manner with the City project team and to support the City with documentation needed for governance approvals and status updates, as follows:* Project / program executive approvals – to provide detailed design document and agreed on use case list and to obtain project approval before proceeding with configuration; support Go-Live approvals; input to regular status updates.
* Architecture, security, and privacy gating – e.g., input to Privacy Impact Assessment (PIA) Threat and Risk Assessment (TRA), Business Impact Assessments (BIA), architecture reviews.

**Response Guidelines:** Proponents are requested to provide a clear narrative description of their delivery methods and management with, at a minimum, the following in its response: 1. Proponent approach to Solution delivery, including methodology (e.g., Waterfall, Staged / Agile), processes, activities, templates, and other tools they propose to use during Solution implementation.
2. Highlights of Proponent approach to assuring quality throughout the Solution delivery process, including any standards or certifications maintained (e.g., ISO certified development methodology), quality review activities, and other methods or techniques to be used.
3. Proponent assumptions of respective roles, accountabilities, and responsibilities for Solution delivery activities.
4. An indication of Proponent agreement to provide documentation required to support governance approval processes, Go-Live, and status updates.
5. Proponent-recommended approach for working in a seamless manner with the City for release project planning, project status reports, steering or other governance reporting, resource management, risk management; and issue escalation.
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| Proponent response: |

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| **Testing** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should provide and support robust testing of the new Solution. **Response Guidelines:** Proponents are requested to provide a clear narrative description of their support for testing of the Solution with, at a minimum, the following in its response: 1. An overview of the Proponent’s general approach and processes for providing testing support to the City during Solution delivery.
2. Proponent testing of the Solution indicating, such as:
	* Use of demos, usability test or other techniques to gather feedback during configuration and enhancement development.
	* Proponent-performed testing (e.g., unit, system, automated, regression) to assure a quality product is given to the City for User Acceptance Testing (UAT).
	* Test documentation that will be provided to the City from Proponent’s testing, if applicable: e.g., notes of testing performed, including scope of testing, test cases, results, resolutions, and any unresolved issues.
3. Discussion of the support to be provided to the City for its UAT, at minimum:
	* + Automated testing tools configured for the Solution.
		+ Test data and tools (such as, for anonymization / pseudonymization of records) to generate test data.
		+ Test environment and tools for ensuring correct settings for testing (e.g., assessment year, time period(s) within an assessment year (e.g., pre or post notice event).
		+ Approach for timely resolution of bugs identified during UAT.
4. Discussion of approach and timing for performance (including, load and stress).
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| Proponent response: |

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| **Data Migration** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should support migration of legacy data into the new Solution with each release, including historical records (e.g., ownership; inspections, reviews; property characteristics; valuation calculations, adjustments and notes; assessed values).**Response Guidelines:** Proponents are requested to provide a clear narrative description of their support for data migration during Solution implementation with, at a minimum, the following in its response: 1. The Proponent’s approach, processes, methods, and tools for data mapping, transformation, and final migration / load into the new Solution.
2. Assumed respective Proponent and the City roles and responsibilities in data mapping, transformation, load and other migration activities.
3. The scope of data migration tools to be provide by the Proponent for each release, such as:
	* + Target data structures, fields, and formats that legacy data is to be mapped to.
		+ Specified data validation rules to aid in cleaning and transformation of legacy data.
		+ Access to environment(s) through stages (e.g., cleansing, migration testing, and load).
		+ Quality controls available throughout migration.
4. Any supplemental tools required to support data migration, not provided by the Proponent.
5. Bandwidth and anticipated load rate, with illustration from prior implementations.
6. Flexibility for migrating historical data to alternate data structure, where cleansing and transformation to new Solution format cannot be achieved.
7. Assumed or known challenges, constraints, or limitations for data migration to proposed Solution.
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| Proponent response: |

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| **Training and Other Change Management** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should provide comprehensive support for administrator and user training with each release of the Solution, as well as guidance and input to other aspects of organizational change management (such as, impact assessment, change planning, organizational design, communications management).**Response Guidelines:** Proponents are requested to provide a clear narrative description of their support for training and knowledge transfer and organizational change management with, at a minimum, the following in its response: 1. How the Proponent will support the City through impact assessment, strategy and planning, and activities for organization change, communications, training, for each release.
2. Listing of current base technical and business training materials and procedure manuals available.
3. Discussion of training environment, direct training (such as, for functional business or technical administrators), and / or electronic documentation (manuals, training modules) to be provided with each release.
4. Support that may be provided to the City as it prepares material for end business user training.
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| Proponent response: |

* 1. **Support and Future Enhancement Approach (Weighting - 7.5%)**

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| **Support and Maintenance Services** | **Page Limit: 12-18** |

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| **Requirements:** The Proponent should provide ongoing support and maintenance services throughout the term(s) of service, as outlined below:*I. Number of users to be supported**II. Support and maintenance services**III. Key Performance Indicators and Service Level Requirements***I.** **Number of users to be supported**The Solution should support 128 City users (within Assessment and Taxation Department, Land Registry, Customer Service / Service Representatives, Finance).**II.** ***Support and Maintenance Services*** The Proponent should provide the City with support and maintenance services to maintain optimal performance of the new CAMA Solution in production, including:Ongoing support and maintenance services should include the provision of all new versions and releases of the service. Maintenance should include the provision of all modifications made those correct errors (e.g., fixes and patches, security, and anti-virus software updates/patches, etc.); that improves the overall performance, efficiency, and capacity or simplifies the operation of the service provided. Respective accountabilities need to be determined and help provided seamlessly.Maintenance support should include the installation or providing of all maintenance modifications available to fix the Solution or any module or component thereof with: * Timely response and resolution of any errors, defects, malfunctions, or other issues affecting the use or performance of a system (collectively, "Events") in keeping with the Required Response Times stated in the below table.
* Providing and facilitating the installation of updates, upgrades, and releases as they are made available to Proponent's other clients.
* Notification of patches and updates affecting security, and applying, testing, and validating the appropriate patches and updates and/or workarounds on a test version of the application before distribution.
* On-call availability via telephone and e-mail during normal business hours for Central Time Zone to receive and respond to inquiries or questions from the City regarding use, operation, or functionality of a system.
* Emergency availability via telephone and e-mail after hours to receive and respond to specific technical problems and questions relating to the operation or functionality of a system.
* Use of ongoing best efforts to maintain the optimal functioning of a system, to correct programming and coding errors, and to provide Solutions to known errors affecting the operation of the system.
* Routine notification to the City as new or updated information pertaining to a system and the documentation becomes available.
* Change management to mitigate the risk of any negative impact to service delivery because of planned and expedited changes to the Proponent’s software services or underlying infrastructure that will result in service disruptions, ensuring that changes are effectively planned, communicated, controlled, and managed.
* Any other support and maintenance services routinely provided to subscribers of Proponent.

Support and maintenance services should be provided via telephone, electronic communication, or as otherwise appropriate to address the issue. Any update, upgrades, releases, or other modifications to the new Solution should be applied to the Solution through established practices (e.g., a patch may be applied following notification, an upgrade should be applied following confirmation / configuration/acceptance testing in development and test environments prior to release). Proponent personnel should be suitably trained in the operation, support, and maintenance of the Solution. If in the reasonable opinion of the City, the personnel provided are not acceptable, the Proponent should provide suitable replacements. *Required Response Times.* Upon notice by the City of a support and maintenance service event, Proponent should address and resolve the event consistent with the following priority, response, and resolution levels:

| **Priority Description**  | **Definition**  | **Response Time After Notice**  | **Resolution Time after Notice**  |
| --- | --- | --- | --- |
| Critical  | Event that renders the Solution and/or interfaces inoperable or allows unauthorized access.  | 1 hour at all times - during normal business hours and after hours.  | Work until corrected (Target 4 hours) |
| Severe | Event that results in a significant impairment of performance of the Solution or impairs essential operations.  | 1 hour during normal business hours; or within 1 hour of beginning of next business day if outside of normal business hours.  | Work until corrected during normal business hours (Target 1 business day) |
| Minor  | Event that has minor impact to the City's business and that does not impact normal operation of the Solution.  | 2 hours during normal business hours; or next business day if outside of normal business hours.  |  Work until corrected during normal business hours  (Target 5 business days |
| Minimal  | Event that has minimal impact or no impact on the City's business.  | 2 hours during normal business hours; or next business day if outside of normal business hours.  | Future patch or release  |

Table: Required support response timesNotwithstanding the above-stated schedule, the Proponent should use its continuing best efforts to correct events as expeditiously as it can. The priority description for each error or issue should be reasonably determined and service should include an ability to escalate requests when services are not available according to agreed service levels and priorities as designated by the City.*Records and Reports.* The Proponent should maintain records of its support and maintenance services, and provide the City with online access to an event ticketing system, which should include at least the following: a) Date, time, and name of contact for each event. b) Date and time of response by the supplier.c) Description of event and analysis of error, defect, or other issue causing event. d) All steps and actions taken to resolve the event.e) Date and time of resolution and the City representative notified of resolution. f) Time and effort associated with resolution. At the request of the City, the Proponent should provide monthly reports of the foregoing records as well as statistics of the Proponent's average monthly compliance with the required response times, the number and types of incident calls received and the service level attainment for service setup and service availability.Service access information should be reported and reviewed monthly. Service access information includes, but is not limited to:* Number of accesses by named service users (by hour).
* Duration of access by named service users (by hour).
* Accesses by unnamed service users.
* Service response time (measured according to service provided, recommendation and approval by the City’s cluster support).
* Service outage and recovery times.

*Failure to Meet Required Response Times.* If the Proponent fails to meet the required response times, the City may offset against any sums due to the Proponent based on metrics, such as:* Amount by which the average response time in the preceding month exceeds the required response times.
* An amount which the Parties agree is a fair and reasonable approximation of the City’s negative financial impact caused by the delay in the Proponent’s response.

The Proponent should provide information on the frequency of software updates and new software releases (i.e., bug fixes and major revision levels) for the system and the anticipated life cycle of the software being proposed. **III Key Performance Indicators and Service Level Requirements** Services should be available to the City 24 hours per day, 7 days a week, supported and demonstrated as per the Key Performance Indicators provided below. Proponents should demonstrate how their proposed Solution will meet Service Level Requirements. The table below outlines Key Performance Indicators (KPI) and the corresponding required service level:

| **KPI Type**  | **Service Area**  | **Service Level Requirement**  |
| --- | --- | --- |
| **Performance**  | Application response time  | Assessment and Taxation Department Solutions and services should meet or exceed the following application response times: Less than two seconds for 95% of responses and no greater than five seconds at any time.  |
| Concurrency | The Solutions should support a minimum 128 concurrent named administrative users and an unlimited number of unnamed public or named external community users. |
| **Availability**  | Service availability rate during core business hours  | All services should be available 24x7x365 with respect to scheduled maintenance /upgrades.  |
| Service availability rate outside of core business hours | All services should be available 24x7x365 with respect to scheduled maintenance/ upgrades. |
| Service availability period  | All services should be available to Users 24x7x365 with respect to availability and scheduled maintenance.  |
| Planned downtime  | Any planned and scheduled maintenance window should be no longer than two consecutive hours outside of normal business hours, on approval by the City.  |
| Unplanned downtime  | In the event of unexpected downtime, the Proponent should ensure that the downtime is no more than seven hours per 30-day period, with a preference for outside of normal business hours.  |
| **Backup and Restore**  | Backup schedule  | The Proponent should perform at minimum the following backups across all services: 1) A full file backup weekly; 2) incremental backups daily outside of core business hours; and 3) at the time of issues or prior to a known significant change to the Solution a full file backup. Backups may include dynamic “hot” backups when users may still be logged in.  |
| Backup retention cycle | The Proponent should retain database backups for a minimum of six months. |
| **Maintenance Windows**  | Notification of major maintenance  | The Proponent should notify by email, the designated City contact of upcoming major maintenance which may affect the way the City business processes are performed three months prior to major maintenance.  |
| Notification of regular maintenance | The Proponent should notify by email, the designated City contacts of all scheduled regular maintenance three months prior to regular maintenance, with such maintenance to be scheduled outside of normal business hours |
| **Disaster Recover and Business Continuity**  | Mean time to recovery (MTTR)  | The Proponent should ensure that the MTTR is no greater than 24 hours.  |
| Recovery time objective (RTO)/ Return to operation | In the event of a failure, the Proponent should ensure that the RTO is no greater than 72 hours. |
| **Privacy and Security**  | Notification of privacy/ security breaches  | The Proponent should disclose all security breaches and breach details to the City no longer than 120 minutes after the breach being discovered.  |
| Compromised user accounts  | The Proponent should ensure that all compromised user account(s) are disabled immediately after a breach is discovered.  |
| Notification of breach attempts | The Proponent should disclose all breach attempts to the City monthly in a written report. |
| **Service Desk and Support**  | Service desk web channel hours  | The service desk web channel should be available 24x7.  |
| Service desk toll-free telephone channel hours  | The toll-free telephone channel should be available during core Central Time Zone business hours.  |
| Service desk toll-free telephone channel  | The toll-free telephone channel should be reliable with an uptime of 99%.  |
| Service desk toll-free telephone channel voicemail response time  | The toll-free telephone channel voicemail response in accordance with incident and request severity levels should be no greater than one business day or as defined by the severity level.  |
| Service desk: toll-free telephone channel wait time | Wait time for users calling the toll-free telephone channel should meet the following expected service level: * 90% of users calling should not wait longer than one minute for a service desk agent or operator to answer the call.
* No more than 2% of users calling should be kept waiting more than three minutes after their call is connected.
 |
| Service desk email acknowledgement time  | Emails sent to the service desk should be acknowledged immediately.  |
| Service desk preliminary triage response time  | Incidents submitted to the service desk should be triaged in accordance with the incident and request severity levels.  |
| **Incidents & Requests**  | Severity level 1: Critical (urgent) | The Proponent should address all incidents defined as severity level 1 with the following service levels: * Target response time: immediate; no more than one hour
* Update frequency: every 30 minutes
* Target resolution time: four hours
 |
| Severity level 2: Severe (high)  | The Proponent should address all incidents defined as severity level 2 with the following service levels: * Target response time: no more than one hour
* Update frequency: every hour
* Target resolution time: one business day
 |
| Severity level 3: Minor (medium)  | The Proponent should address all incidents defined as severity level 3 with the following service levels: * Target response time: no more than 12 hours
* Update frequency: every 12 hours
* Target resolution time: no more than five business days
 |
| Severity level 3: Minimal (Low) | The Proponent should address all incidents defined as severity level 4 with the following service levels: * Target response time: no more than 12 hours
* Update frequency: every month
* Target resolution time: based on prioritization with Proponent, target will be determined (future patch or release)
 |
| **Reporting**  | Availability report  | The Proponent should provide the City contact an availability report that indicates the actual availability of all services monthly, sent within 15 business days of the end of the month. |
| Incident report  | The Proponent should provide the designated City contact an incident report that includes the total number of incidents by type and originator with the following frequency: Monthly (sent within 15 business days of the end of the month).  |
| Performance notifications  | The Proponent should notify the designated City group contact of unplanned service degradation or outages via email or other communication channel with the following frequency: Immediately upon identification by the Proponent.  |
| Services roadmap  | The Proponent should provide the City contact annually, a roadmap describing planned changes to services that may impact services and its users.  |

**Response Guidelines:** Proponents are requested to provide a clear narrative description of support and maintenance services they will deliver throughout the term of service with, at a minimum, the following in its response: 1. An outline of the Proponent’s approach to delivering support and maintenance services to the City, with reference to outlined requirements and how they will meet these.
2. An indication of Proponent ability to support number of users indicated.
3. An indication of Proponent agreement to meet outlined service level requirements, identifying any issue(s) with stated levels.
4. A sample service level agreement (submitted as an appendix or exhibit), consistent with the above requirements, governing provision of services for proposed Solution.
5. Description of disaster recovery, incident response plans, backup procedures, their alignment with industry standards, and evidence these plans, and procedures are tested at least annually.
6. Description of how the Solution is hardened and managed against vulnerabilities.
7. Proof of regular third-party penetration/vulnerability scans and a summary of recent results.
8. Description of audit and logging capabilities, and log review policies.
9. Description of how events are analyzed in order to detect incidents.
10. Description of how customers are notified of event/incident detections.
11. An indication of reasonable expectation for recovery time in the event of an outage incident
12. An indication of reasonable expectation for recovery point objective in the event of an incident.
13. A description of existence of a secure, scheduled, and audited patching process based upon release cycles or in the instance of a security breach.
14. Standard key performance indicators to be used in reporting to the City and planned frequency of reports.
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| Proponent response: |

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| **Solution Upgrades** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should be accountable for planning and implementing new versions, releases, or other updates to its Solution and its underlying infrastructure or platform to address any issues and to keep it current with CAMA, other business, and technology opportunities, needs and priorities.**Response Guidelines:** Proponents are requested to provide a clear narrative description of Solution updates and its underlying infrastructure with, at a minimum, the following in its response: 1. How maintenance or upgrade work for the Solution is identified, prioritized, and scheduled.
2. Whether there is a client user community(ies) that contributes to Solution direction and priorities. If so, indicate:
* Whether community is self-organized or Proponent-organized.
* The number of participating customer organizations.
* Format and frequency of formal meetings.
* Community input to identify issues, opportunities, requirements, priorities.
1. Direct method for a customer to identify issues, opportunities, requirements, priorities.
2. Sample of Proponent’s maintenance and upgrade schedule for current customers.
3. How the Proponent will approach maintenance or upgrade events, indicating:
* Availability of advance schedule outlining planned events and the scope of each.
* General timing / frequency of events.
* Mandatory / optional aspects of upgrade(s) and flexibility for customer timing of enablement of upgrade features.
* Proponent providing, in advance of each event, details for the event, like:
* Plan, with a listing of changes to be made.
* For each listed change, details of change and potential impact to customers.
* Other anticipated impacts of maintenance or upgrade changes on operations, including length of time of upgrade activities (including development and test).
* Services to be provided to the City to configure, extend and test updates and to test / refine existing configurations or extensions, as required, due to upgrade.
* Respective roles and responsibilities for maintenance / upgrade plan activities.
* Other assistance or support to be provided to the City with the planning and implementation of any additional upgrade activities (e.g., Solution documentation updates, communications, training).
* Any costs to be billed to the City in addition to fees.
1. Availability of automated test tools and test data to facilitate regression and other testing of Solution upgrades.
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| Proponent response: |

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| **Future Flexibility and Upgradeability** | **Page Limit: 6-10** |
| **Requirements:** The Proponent should deliver a Solution well-architected for flexibility and upgradeability, with all configurations, extensions, fixes and maintenance, upgrades, or other modifications done using established and communicated methods that facilitate ease of change and will not limit or add complexity to future change.**Response Guidelines:** Proponents are requested to provide a clear narrative description of future flexibility and upgradeability of the proposed Solution with, at a minimum, the following in its response: 1. How initial configurations and extensions are generally made within the Solution, including:
	1. The methods and standards used to isolate City-specific configurations and extensions (e.g., for data, logic, workflow).
	2. Availability of documentation and training on configuration and extension methods.
2. Confirm that Proponent’s proposed Solution will use standard methods and not compromise or complicate its future flexibility and upgradeability.
3. Identify any known or potential issues with future (post-implementation) flexibility and upgradeability due to the base product or the proposed implementation of the Solution.
4. The extent to which Proponent personnel are suitably trained in the use of standard methods for maintenance, upgrades, configuration, and extension of the Solution.
5. A summary of the results of any quality audits performed by the Proponent or an independent party to test standard configuration and development within the Solution.
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| Proponent response: |

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| **Future Enhancement Services** | **Page Limit: 6-8** |
| **Requirements:** The Proponent should provide the Assessment and Taxation Department (ATD) with ongoing Solution configuration and extension services, on an as-needed basis, in response to future legislative, business, and other changes.**Response Guidelines:** Proponents are requested to provide a clear narrative description of future enhancement services with, at a minimum, the following in its response: 1. The Proponent’s approach for future enhancement work for Assessment and Taxation Department (ATD), how initiated, planned, executed.
2. Proponent resource types to be used on enhancement project(s).
3. Respective accountabilities and responsibilities of Assessment and Taxation Department (ATD) and the Proponent.
4. Proponent methods for an enhancement initiative (e.g., delivery methods – such as, Agile vs waterfall; minimum to maximum scope or duration of initiatives, as applicable).
5. Availability of automated test tools and test data to facilitate regression and other testing of Solution enhancements.
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| Proponent response: |

* 1. **Architecture (Weighting - 2.5%)**

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| **Architecture – Written Response (Weighting – 2.5%)** | **Page Limit: 10-15** |
| **Requirements:** The Proponent should provide the Assessment and Taxation Department (ATD) with ongoing Solution configuration and extension services, on an as-needed basis, in response to future legislative, business, and other changes.**Response Guidelines:** Proponents are requested to provide a clear narrative description of future enhancement services with, at a minimum, the following in its response: 1. **Conceptual Architecture:**

A diagram and description of the full, proposed Solution conceptual architecture that highlights: * Infrastructure or platform service offerings to be used and the relationships between them.
* Extent of configuration and extension required.
* Any special approaches to hosting, process, data, security / privacy, integration, or multi-lingual interfaces being proposed.

 1. **Data Migration Strategy and Methodology:**

The proposed Solution should provide a robust and efficient data migration strategy and methodology that minimizes manual effort and ensures data integrity. Describe how the Solution enables seamless migration of data from other systems, including data cleansing and transformation processes, while minimizing the need for extensive vendor or developer involvement.1. **Integration Bus for Flows to Other Applications:**

The Solution should offer an integration bus or similar mechanism to facilitate smooth data flows between the CAMA system and other applications. Describe how the proposed Solution enables seamless integration with external systems, such as third-party software or APIs, to exchange data and support business processes without extensive custom coding or dependency on developers.1. **High Availability Strategy for CAMA System:**

The proposed Solution should include a high availability strategy that ensures continuous access to the CAMA system with minimal downtime. Describe how the Solution implements redundancy, fault tolerance, etc. to achieve high availability, ensuring system resilience and minimizing the need for manual intervention during failures.1. **Disaster Recovery Plan:**

The Solution should have a comprehensive disaster recovery plan in place to minimize data loss and enable quick system recovery in the event of a catastrophic event. Describe how the proposed Solution incorporates backup mechanisms, data replication, and off-site storage to ensure business continuity and reduce reliance on extensive vendor or developer involvement for recovery operations.1. **Performance and Scaling Options during Peak Load Periods:**

The proposed Solution should offer performance and scaling options that can handle peak load periods efficiently. Describe how the Solution supports automatic scaling, load balancing, and resource optimization to ensure optimal system performance during high-demand periods, minimizing the need for manual adjustments or vendor/developer intervention.1. **Load Testing and Behavior during High Loads:**

The Solution should undergo rigorous load testing to assess its behavior and performance under high load conditions before being deployed into production. Describe how the proposed Solution incorporates load testing methodologies, performance monitoring, and optimization techniques to ensure stability and responsiveness during high-demand scenarios, without significant involvement from vendors or developers. 1. **Complexity of Implementation Configuration and Methodology:**

The proposed Solution should have an implementation configuration and methodology that minimizes complexity and reduces the need for extensive customization. Describe how the Solution supports a simplified implementation process, including pre-built templates, intuitive configuration interfaces, and standardized workflows that allow for rapid deployment and reduce the reliance on specialized vendor or developer involvement. |
| Proponent response: |

1. Product Demonstration

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| **Product Demonstration (Weighting - 45%)** | **Page Limit: N/A** |
| Product demonstration will be conducted based on the Business Use Cases captured under Attachment B. The City will share the details of the Product Demonstration in the month of August. |

1. Pricing

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| **Pricing (Weighting - 15%)** | **Page Limit: 6-12** |
| Proponent should provide the following details used in the Solution pricing, but not limited to:* A breakdown of the bid price per services and deliverables, with a total that agrees to the total bid price.
* Define the unit cost and any associated thresholds, based on volume of licenses/subscriptions, by module/functionality and / or provide a breakdown of the different levels of direct User licensing and associated costs per license / subscriptions with each level.
* Provide a breakdown of the different types of indirect licensing costs and how those costs are determined, as included in the bid price.
* Specify whether a single direct or indirect license can be used on multiple devices without incurring additional costs.
* Provide a breakdown of how data storage costs are determined, as included in the bid price.
* Identify any costs associated with data extracts or data transmission between integration points and after the Solution is deployed, or if this included in annual licensing and hosting bid price.
* Describe your client exit strategy and any additional costs that are expected by the client.
* Identify method of annual inflation / escalation factor determination for annual renewals.

Please refer to attachment: **486-2023\_Form\_B-Prices** and provide your response based on Total Bid Price on Form B-Prices. |
| Proponent response: |