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Information Technology Department
100 N. Appleton Street
Appleton, WI 54911

MEMO

To: Alderperson Konetzke and Members of the IT Committee

From: Dean Fox, Information Technology Director

Date: 5/4/16

Re: Request to award contract for Computer Assisted Mass Appraisal (CAMA) implementation project to Patriot Properties of Marblehead, MA not to exceed \$308,341, this is a base of \$280,310 with a 10% contingency for potential programming needs.

The 2016 budget includes **\$3,000,000** CIP funding for an Enterprise Resource Planning solution to replace the IBM iSeries a portion of which includes a new Computer Assisted Mass Appraisal (CAMA) package for City Assessments.

An RFP for the CAMA solution was issued to four (4) firms who responded with five (5) proposals, one firm (Tyler Technologies) responded with a hosted version along with an in-house version. The RFP review team has completed the evaluation of all 5 proposals received. The Assessor's Office took exceptional steps to review, take part in demonstrations, and check multiple references of the vendors.

The scores of the proposals were based on the following:

- Functionality both "out of the box" as well as added programming
- Investments and costs
- Service and Support
- Technical Requirements
- Other value added features
- Vendor viability

Below is the list of proposers and scores with the above criteria:

Vendor	Rank in score	Rank in price	Cost Year 1	Cost Year 1-5
Patriot Properties	1	3	\$280,310	\$362,310
Assessment Tech	2	2	\$180,287	\$285,187
Dev-Net Inc	3	1	\$88,661	\$248,989
Tyler Technologies (in-house)	4	4	\$823,410	\$1,105,430
Tyler Technologies (hosted)	5	5	\$501,580	\$1,219,180

The evaluation process consisted of three evaluation rounds completed by the scoring team. The top two vendors after round two of the scoring provided a full day on-site product demonstration

to the Assessors, GIS, IT, and Economic Development staff members. Patriot was the top choice of all of these City Divisions. The scoring team in its final evaluation unanimously agreed that Patriot Properties is the vendor of choice for the following reasons.

- Thoroughness and detail of the RFP response.
- Reference checks with their WI clients, third party vendors, and WI Department of Revenue that came back with high praise.
- Other large users including the WI cities of Racine, Eau Claire and Milwaukee.
- Knowledge, experience, and stability in the industry including over 30 years of providing assessment software and services to over 200 local government clients in 18 states.
- Interfaces with ESRI GIS, Tyler Munis, Apex Sketching, Marshall & Swift Commercial Valuation software.
- Contains the necessary features expected of a complete system (ad-hoc data query ability, full audit trail, test environment, fully integrated 3rd party software, flexible import / export capability, etc).
- Flexible solution allowing us to customize our own fields, labels, views, user authorities, etc.

The evaluation team requests your consideration and approval of a contract with Patriot Properties Inc.

If you have any questions regarding this recommendation please contact Dean Fox.