



THE HONORABLE ERROLL G. WILLIAMS  
**ORLEANS PARISH ASSESSOR'S OFFICE**  
[WWW.NOLAASSESSOR.COM](http://WWW.NOLAASSESSOR.COM)

**REQUEST FOR PROPOSALS  
FOR  
MOBILE DATA COLLECTION**

**ORLEANS PARISH ASSESSOR'S OFFICE**

**PROPOSAL DUE DATE:**

**5<sup>th</sup> day of AUGUST, 2022**

**4:00 pm (CST)**

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## SECTION 1: PROPOSED REQUEST FOR PROPOSALS (RFP) SCHEDULE

### MOBILE DATA COLLECTION SYSTEM ("System")

- 24 June 2022** Requests for Proposals (RFP) distributed and posted at:  
[http:// www.nolaassessor.com](http://www.nolaassessor.com)
- 08 July 2022** Deadline for Notice of Intent and written questions on RFP  
Notice of Intent and written questions should be directed to:  
Marina M. Kahn  
1300 Perdido St, Room 4E01  
New Orleans, LA 70112  
Email: [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com)
- 15 July 2022** Answers to written questions posted on Orleans Parish Assessor's Office website:  
[http:// www.nolaassessor.com](http://www.nolaassessor.com).
- 05 August 2022** Deadline for proposals  
Two (2) original hardcopies or One (1) electronic copy to:  
Marina M. Kahn  
1300 Perdido St, Room 4E01  
New Orleans, LA 70112  
Email: [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com)
- Tentative Schedule:**
- 12 August 2022** Evaluation of Proposals
- 19 August 2022** Start Interviews with Top Proposals, if Orleans Parish Assessor's Office deems necessary
- 26 August 2022** Select Contractor

## SECTION 2: DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

### 2.1 PURPOSE

The purpose of this Request for Proposals (RFP) is to procure the professional services of a mobile application developer to implement a current off the shelf (COTS) application/system for the mobile data collection and maintenance of real property accounts, with keyless data entry back into the source file (e.g., the computer assisted mass appraisal system, CAMA). Currently appraisers conduct these data collection and maintenance processes on paper, with manual data entry into CAMA, or other systems. The proposed System will replace that method, resulting in a more efficient, accurate, and timely data collection solution.

### 2.2 BACKGROUND

*The mission of ORLEANS PARISH ASSESSOR'S OFFICE is to achieve fair and equitable values among all classes of property by maintaining the highest standards in mass appraisal practices and maintaining accurate and complete property records. We are guided by the goals of providing quality service to the public, developing high-performance employees through continuing education and training, and by efficiently managing ORLEANS PARISH ASSESSOR'S OFFICE growth through the use of technological tools which expedite the workflow and dissemination of information to the staff, taxing entities and the public. We are dedicated to serving the citizens of this community.*

*In pursuit of the above mission, we are ready to expand our use of technological tools to provide for the discovery and valuation of 175,665 parcels to be reviewed by 26 field appraisers managed by 6 review appraisers and/or supervisors.*

### 2.3 SCOPE OF WORK

ORLEANS PARISH ASSESSOR'S OFFICE is looking for a Mobile Data Collection Solution that can import/update data directly into its CAMA System, includes a sketching solution compatible with our current format resulting in no data loss; and further, provide the functionality as described in the minimally desired features and specifications which follows. The successful vendor must be capable of a January 2023 go-live date, or within 14 weeks, whichever is later.

Orleans parish assessor's office will contract with a single firm to provide the services described herein. Proposals shall fully address the scope of work below and include a description of all deliverables and activities.

Orleans parish assessor's office expects to award a contract soon after August 26, 2022 (contractor selection), and to have the proposed solution fully tested and live prior to January 1, 2023. It is anticipated the contract will include services to implement and test a wireless mobile application/system to collect real property data (to handle approximately 175,000 accounts and at least 26 mobile field appraisers), replacing the current paper form process; and replacing the manual data entry process. The contract may also include options to renew the contract for additional periods of time, or for additional related services.

The goal of the mobile application is to build efficiency and accuracy into the process of collecting, entering, analyzing and disseminating real property data and statistics. The application can be built in an iOS, Android, or Windows environment (or preferably cross compatible).

### 2.3.1 Mobile Data Collection System's Minimally Required Features & Specifications:

1. Ease of use. The design should be at least as easy to use as collecting information on paper.
  - a. Increase in field productivity must be demonstrated. Please provide proof of ROI or other performance metrics.
2. Use of optimal mobile operating system: iOS, Android, and/or Windows 8-10.
  - a. What Mobile Operating Systems does your application support?
3. Resource efficiency – The application should be optimized to be used for a full day of data collection without the need to recharge the battery.
  - a. Do you recommend a device? If so, which one and why?
  - b. Estimate the impact to the Orleans parish assessor's office's servers, networks, and IT staff.
4. Accuracy – Built in data validation scripts/routines/processes to ensure the data that is entered is as accurate as possible given the bounds of accepted values and logic.
  - a. When and how are changes made in the field imported into the database, QA'd and the results communicated to field appraisers.
  - b. Explain the data structure your application employs and how selected data is made mobile.
5. Stand-alone app – The application cannot be reliant on a wireless Internet connection as some areas of the Orleans parish assessor's office are located in remote areas where Internet service is not available.
  - a. How does your application handle non-Internet areas; i.e. online/offline data collection
  - b. Explain how communication takes place to and from the field and the office, both when Internet connectivity exists and when it doesn't.
6. Data Storage and Transfer – The application must have the capability to store multiple days' worth of data per appraiser and a method built in to automatically transfer the data to Orleans parish assessor's office without appraiser interruption.
  - a. How does your application support image capture, labeling and transmission?
  - b. Does your application support interactive GPS and GIS mapping capabilities? Explain and provide examples.
  - c. Please explain how appraisers are assigned their files and the retrieval method.
7. Real-time tracking and live QC
  - a. How does your system currently support real-time and historic tracking of field appraisers?
  - b. How does your system support live QC?
  - c. List all auditing and productivity reports included in your system.

The ORLEANS PARISH ASSESSOR'S OFFICE is seeking proposals from mobile application developers, or mobile application system providers, to analyze, plan, setup, test, and support the objectives of this RFP; as well as, to consider future needs and functionality. The selected contractor is

expected to provide creative solutions in making our current processes more efficient, user friendly and accurate than the current paper process.

The intent is for the selected contractor to incorporate all information in a manner that utilizes consistent design style and layout themes, and to provide a reliable, efficient, interactive, and user-friendly mobile application, with keyless data entry into the CAMA system, and other ad-hoc files if needed.

## **2.4 AUDIENCE**

The users of the mobile application will be field appraisers and supervisory personnel who are currently engaged in the discovery and collection of real property data for ad valorem property taxation.

The users of this application will have various degrees of experience with advanced technology. Given individual differences with experience in the field, the users will expect to have an application that is as easy to use and navigate as the current paper forms, and/or the software systems used while in the office.

## **2.5 TECHNICAL REQUIREMENTS**

### **2.5.1 Design Specifications**

The following are design elements that have been determined to be essential to the mobile data collection system:

1. Intuitive design – This product provides an easy to use and consistent user interface throughout the application.
2. This product is scalable for a growing jurisdiction, and additional data fields can easily be made mobile in the future, after the original go-live, without the need to upgrade any core components.
  - d. Describe the extent to which your application is scalable to any number of parcels; and, how new, updated, or obsolete data elements are handled after go-live.
3. Web based installation of all application components, with one step required for the database, client, .net framework, and application components.
  - a. Please describe your installation process and provide the estimated time required of the appraisal district's IT staff for each process.
4. Can your mobile database or conversion routines handle our data format(s), without any damage to the source format (for passing field data back to CAMA/source)?
  - a. Please explain.

### **2.5.2 Data Management Capability**

The mobile application will interact with data sets from our CAMA system, other ad-hoc files, and other day-to-day office duties. Please provide any noteworthy strengths of the proposed mobile data collection system in the areas of:

1. System Security & Administration,
2. Database Technology,
3. Data Integrity,
4. Multi-tasking (capabilities for multiple users in the office and in the field),
5. Data Dictionary and,
6. Basic Support and Maintenance.
  - a. Describe your application data backup and recovery procedures for the mobile database and application included in basic support and maintenance.
7. Describe the process for import/conversion/data setup and if it supports a test period prior to final deployment.

### **2.5.3 Data Elements**

1. Describe how your application allows users to add custom/user-defined fields.
2. Describe how your application provides the capability to have calculated user-defined fields.
3. Describe how data locations and screen layouts are determined.
  - a. Describe how data elements are selected for display.
4. Describe any data validation techniques and default values options available.

### **2.6 Mobile Database & System Functionality**

1. Please describe how multiple parcel accounts are handled by the system and how the appraiser would review, collect, and/or modify data on such an account.
2. What is the character size limit for notes, comments, and legal descriptions?
3. Describe how you handle historical values at the account level.
4. Describe the process whereby data being imported from the field is reviewed or loaded directly into the CAMA file.
5. How many changes per day per session does your application allow?
6. Describe the process whereby review appraisers at the desktop can approve or reject data that's collected or edited.
7. Describe the process by which field appraisers are assigned work. How is that communicated to individual appraisers?



8. How is valuation data (including different approaches to value) presented or made available to the field appraiser?
  - a. Describe any other appraisal/valuation functions that are capable in the field.
9. How are multiple land records for an account presented to the field appraiser?
10. How is building permit data associated with individual parcels and communicated to field appraiser?
11. How is appeal/protest information associated with individual parcels and for certain tax years communicated to field appraiser?
12. Describe any capabilities to link ad-hoc data to CAMA data files.
13. Describe the update process for an account with multiple building structures.
14. How are assigned parcels ordered/sorted, or prioritized for the field appraiser?
  - a. Describe how account details are accessed by the appraiser.
15. Describe the availability of unassigned parcels, i.e. parcels in the vicinity of assigned parcels.
  - a. How are accounts or parcels checked-on and checked-out?
  - b. Describe how appraisers would access a nearby account if it's not flagged and assigned for review.
16. Provide examples of your predefined standard reports, i.e. neighborhood level, user level, productivity, audit, etc.
17. Describe what mobile sketching options are available in the proposed system.
18. Describe how your application handles GIS shapefiles.

## **2.7 Timing, Implementation, Testing, and User Acceptance**

Please describe your requirements for gathering, implementation, testing, and user acceptance procedures; along with a general idea of the time anticipated for each phase.

## **2.8 Additional Considerations and Supplemental Questions**

1. Please describe your technological platform today and the changes you see affecting that platform over the next 5 years.
2. What industry proven, stable, and scalable platform is your application written in?
3. Please describe your installation process providing estimated time required of Orleans parish assessor's office's IT staff for each process.
4. How many servers are required and under what circumstances would a single server be an option?

5. What are the recommended server specifications for a single server?
6. What are your recommended office workstation specifications (if applicable, explain)?
7. Describe the security required at the office workstation level to install and run the application (if applicable, explain).
8. Describe the application installation and update process for each mobile and office device.
9. Describe a typical release cycle for your product.
10. Describe the standard process for creating enhancements to the software.
11. What factors influence your decisions when making technology and functionality changes?
12. To what extent can users make individualized changes to the user interface?
13. What is the Orleans parish assessor's office's role in the conversion/setup process? Does your company offer guidance to the jurisdiction with data clean-up?
14. What does scalability mean to you as a company and how scalable is your solution? In what ways does your software provide scalability as counties/parishes change and grow?
15. How has your software been designed to ensure an efficient learning curve?
16. State any limitations on usage including whether or not there are restrictions on the total number of users who can be defined to the system or access it concurrently.
  - a. Describe what would be needed to increase the number of concurrent or defined users.

## **SECTION 3: INSTRUCTIONS, CONDITIONS, AND NOTICES TO PROPOSERS**

### **3.1 QUESTIONS**

Questions regarding this RFP shall be submitted in writing no later than 4:00pm CST on July 08, 2022 to:

Marina M. Kahn  
1300 Perdido St, Room 4E01  
New Orleans, LA 70112  
Email: [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com)

### **3.2 NOTICE OF INTENT**

If your organization is interested in submitting a proposal, please send an email by 4:00pm CST on August 05, 2022 to [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com), notifying ORLEANS PARISH ASSESSOR'S OFFICE of your intent to submit a proposal. Your "reply to" address will be added to an email list to notify you of any modification to this RFP.

### **3.3 AMENDMENTS TO SOLICITATIONS**

If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Proposers shall acknowledge receipt of any amendment to this solicitation in Proposer's cover letter.

## **3.4 SUBMISSION, MODIFICATION, REVISION, AND WITHDRAWAL OF PROPOSALS**

### **3.4.1 Deadline for Proposals**

4:00pm CST, August 05, 2022

### **3.4.2 Proposals by Electronic Copy**

Must be submitted to:

Marina M. Kahn  
1300 Perdido St, Room 4E01  
New Orleans, LA 70112  
Email: [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com)

Proposals and modifications to proposals may be submitted via electronic copy in PDF or MS Word format.

ORLEANS PARISH ASSESSOR'S OFFICE reserves the right to consult with and to consider information from its own sources, including information from state and federal agencies regarding the proposer's prior performance or the status of outstanding investigations, warrants, or complaints involving the proposer.

Proposers are responsible for submitting proposals, and any modification of revisions, so as to reach ORLEANS PARISH ASSESSOR'S OFFICE by 4:00 p.m., local time, on August 05, 2022.

### **3.4.3 Late Proposals**

Any proposal, modification, or revision at the ORLEANS PARISH ASSESSOR'S OFFICE designated in the solicitation after the exact time specified for receipt to offers is "late" and will not be considered; unless, an emergency or unanticipated event interrupts normal ORLEANS PARISH ASSESSOR'S

OFFICE processes so that proposals cannot be received at the office designated for receipt of proposals by the exact time specified in the solicitation, and urgent ORLEANS PARISH ASSESSOR'S OFFICE requirements preclude amendment of the solicitation, the time specified for receipt of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal ORLEANS PARISH ASSESSOR'S OFFICE processes resume.

#### **3.4.4 Proposal Withdrawal**

Proposals may be withdrawn by written notice received at any time before award. Proposals may be withdrawn in person by an offer or an authorized representative, if the identity of the person requesting withdrawal is established and the person signs a receipt for the proposal before award.

#### **3.4.5 Authorized Representative for Clarification of Proposal Items**

Proposer shall submit the name, address, telephone number, and email address of the person(s) with the authority to bind the firm, as well as to answer questions or provide clarification concerning the firm's proposal.

#### **3.4.6 Cost of Proposal Liability**

ORLEANS PARISH ASSESSOR'S OFFICE is not liable for any costs incurred by vendors/contractors in developing or submitting their response to this RFP.

### **3.5 PROPOSAL FORMAT AND CONTENT**

#### **3.5.1 General**

Proposals should be prepared simply and economically, providing a straightforward, concise description of the vendor's ability to meet the requirements of the work outlined in this RFP.

Proposals may be submitted as an electronic file attached to an email message and sent to [mmkahn@orleansassessors.com](mailto:mmkahn@orleansassessors.com) with the following inserted in the "subject" line of the email: "RFP: Mobile Data Collection System".

Emailed proposals must be received by the specified deadline according to the internal clock of ORLEANS PARISH ASSESSOR'S OFFICE's server.

Proposers should use the following outline in organizing the content of their proposals:

#### **3.5.2 Cover Letter**

The letter of transmittal shall, at a minimum, contain the following:

- a. Identification of the Proposer, including business name, address, and telephone number;
- b. Name, title, address, telephone number, fax number, and email address of a contact person during the period of proposal evaluation;
- c. A statement that the proposal shall remain valid for a period not fewer than ninety (90) days from the due date of proposals;
- d. Identification of any information contained in the proposal that the Proposer deems to be, and establishes as, confidential or proprietary and wishes to be withheld from disclosure to others under the US Freedom of Information Act. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by ORLEANS PARISH ASSESSOR'S OFFICE; and
- e. The signature and typed name of the person authorized to bind the offering firm to the terms of the proposal

### **3.5.3 Table of Contents**

Insert a complete table of contents for material included in the proposal, including page numbers.

### **3.5.4 Conflicts of Interest Disclosure**

Disclose any existing or potential conflicts of interest between the scope of work required by ORLEANS PARISH ASSESSOR'S OFFICE and your firm's other business activity.

### **3.5.5 Work Plan / Technical Approach**

#### **3.5.5.1 Understanding of Objectives and Requirements**

This section should demonstrate the Proposer's understanding of ORLEANS PARISH ASSESSOR'S OFFICE's objectives and requirements, demonstrate the proposer's ability to meet those requirements and outline clearly and concisely the plan for accomplishing the specified work.

#### **3.5.5.2 How Objectives will be Accomplished**

Describe succinctly how your firm would accomplish the work and satisfy ORLEANS PARISH ASSESSOR'S OFFICE's objectives as described in this RFP, including a timeline for completion.

### **3.5.6 Cost**

This section should disclose all charges that will be assessed to ORLEANS PARISH ASSESSOR'S OFFICE as a result of the services provided by Proposer.

Quote an estimated total fee and total hourly fees for completing all requirements outlined in the Scope of Work.

Quote rates and cost for additional, optional consulting hours that may be required for special projects/consulting work.

State your preference for how payments should be made (e.g. monthly, quarterly, semi-annually).

### **3.5.7 Exceptions / Deviations**

State any exceptions or deviations from the requirements stated in this RFP. If your firm wishes to present alternative approaches to meet ORLEANS PARISH ASSESSOR'S OFFICE's work requirements, these should be thoroughly explained.

### **3.5.8 Appendices**

Furnish as appendices any supporting documents requested in the preceding instructions.

Include any additional information you deem essential to proper evaluation of your proposal and which is not solicited in any of the preceding sections.

## **3.7 PROPOSAL EVALUATION**

### **3.7.1 General**

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. An award will be made to the Proposer whose offer is judged to be the most advantageous to ORLEANS PARISH ASSESSOR'S OFFICE.

ORLEANS PARISH ASSESSOR'S OFFICE expressly reserves the right to reject any and all proposals and make no award under this RFP, or to negotiate separately with competing vendors.

### 3.7.2 Process

All Proposals received in accordance with these RFP instructions will be reviewed, analyzed, evaluated and scored in accordance with the criteria described below. If needed, additional information may be requested from one or more Proposers. Interviews may be conducted with the top scoring Proposers, if the final top two scores are within 10 points of each other -- the interviews would be conducted by ORLEANS PARISH ASSESSOR'S OFFICE Staff.

### 3.7.3 Request for additional information

During the evaluation period, ORLEANS PARISH ASSESSOR'S OFFICE may request additional information in order to fairly evaluate a Proposer's offer. If such information is required, the Proposer will be notified in writing (or by email) and will be permitted a reasonable period of time to respond.

### 3.7.4 Evaluation Criteria

By use of proprietary numerical and narrative scoring techniques, proposals will be evaluated by ORLEANS PARISH ASSESSOR'S OFFICE against the factors specified below. The relative weights of the criteria – based on a 100 point scale – are shown in parentheses. Within each evaluation criterion listed, the sub-criteria are those described in Section 3.5, "Proposal Format and Content". The evaluation criteria are:

- Understanding of Objectives and Requirements;
  - *Based upon responses to sections 2.1 through 2.4.* (30 points total)
- How Objectives will be Accomplished;
  - *Based upon responses to sections 2.5 through 2.8.* (40 points total)
- Cost. (30 points total)

## 3.8 CONTRACT AWARD

All qualified proposals will be evaluated and an award will be made to the firm whose combination of cost and technical offers is deemed to be in the best interest of ORLEANS PARISH ASSESSOR'S OFFICE as determined solely by the ORLEANS PARISH ASSESSOR'S OFFICE. The ORLEANS PARISH ASSESSOR'S OFFICE may reject any or all of the proposals if such action is in the ORLEANS PARISH ASSESSOR'S OFFICE's interest. The ORLEANS PARISH ASSESSOR'S OFFICE may waive informalities and minor irregularities in proposals received. The decision awarding the contract is non-appealable and not subject to challenge.

The ORLEANS PARISH ASSESSOR'S OFFICE reserves the right to make an award on any item for a quantity less than a quantity offered, at the unit cost or price offered, unless the offer specifies otherwise in the proposal.

The ORLEANS PARISH ASSESSOR'S OFFICE reserves the right to make multiple awards if, after considering the additional administrative cost, it is in the ORLEANS PARISH ASSESSOR'S OFFICE's best interest to do so.

Exchanges with proposers after receipt of a proposal do not constitute a rejection or counteroffer by the ORLEANS PARISH ASSESSOR'S OFFICE.

The ORLEANS PARISH ASSESSOR'S OFFICE may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or subline items. Unbalanced prices exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if the ORLEANS PARISH ASSESSOR'S OFFICE Fiscal Manager determines that the lack of balances poses an unacceptable risk to the ORLEANS PARISH ASSESSOR'S OFFICE. If a cost realism analysis is performed, cost realism may be considered by the source selection authority in evaluating performance or schedule risk.

The ORLEANS PARISH ASSESSOR'S OFFICE may disclose the following information in post award debriefings to other proposers: The overall ranking of all proposers; and, a summary of the rationale for award.