



## **REQUEST FOR INFORMATION (RFI)**

This Request for Information (RFI) is being issued by the Ohio Department of Taxation (ODT) for:

### **Modernized (Property)Tax Equalization System**

Release Date: August 31, 2020

Response Due Date and Time: October 16, 2020 @ 5PM EST

## Request for Information Tax Equalization System

### Section I- Purpose:

The Ohio Department of Taxation (ODT) releases this Request for Information (RFI) for the purpose of obtaining information and recommendations for a modernized tax equalization system. Information that any interested party wishes to submit will be done so voluntarily and with the understanding that this RFI is for information gathering purposes only and is not a formal solicitation. A formal procurement, such as a Request for Proposals (RFP) or Request for Quote (RFQ) may be issued as a result of, and subsequent to, this RFI.

ODT is interested in receiving information from interested vendors or any other source of information. Cost information provided by vendors will be used solely for the purposes of performing a market analysis for the acquisition of the necessary products and services.

ODT is charged with administering Ohio's statewide taxes, **as well as numerous taxes levied by Ohio's municipalities and counties**. Currently, ODT's Tax Equalization (DTE) effort is primarily supported by a mainframe CICS/COBOL/DB2 based system.

ODT is primarily focused on seeking a new or existing solution that can accommodate the state's tax equalization efforts as outlined in Section II below. However, ODT is also interested in learning more about all the various features of the product. Detailed responses to Section III will assist ODT in gathering information on possible modernized tax equalization solutions.

### Section II –Background of Tax Equalization:

The Department of Tax Equalization (DTE) maintains the real property values by taxing district, tax rates by unit and taxing district, and maintains the relationships between the units and taxing districts and the calculated reduction factors. Additionally, the county auditors are required to provide various forms that relate to the value of the real property within their county.

#### **Reduction Factors**

Based on the appraisal value (increases and decreases) of the various classes of property values within the taxing units, DTE calculates and provides the tax reduction factors to the county auditors to assist them in the appropriate collection of property taxes that are comprised of the various levies.

#### **Real Property Values by Taxing District**

The DTE oversees the appraisal activity of the eighty-eight (88) Ohio county auditors. Each county auditor is required to reappraise the various classes of real property every six (6) years

and adjust the values accordingly on a (3) year cycle. The counties are required to provide the updated valuation information to DTE to facilitate the correct calculations of reduction factors.

The DTE maintains the tax rates and reduction factors and the relationships between the counties, taxing districts, and political units. To clarify, a county will have multiple taxing districts that have multiple political units. Additionally, a political unit may belong to several taxing districts in the same county or multiple counties.

### **County Auditor Documents and Submissions**

The county auditors are required per statute to provide DTE with various forms that relate to the valuation of property within their county. The county auditors provide information regarding the transfer/sale (conveyance) of property within their county, the valuation of manufactured homes with their county, the valuation of property used for agricultural purpose, etc.

### **Section III- Solution Information Requested:**

Please respond in detail to each of the following questions:

#### ***Solution installation details:***

1. Please list all states (and tax types for each state) in which you installed a property tax equalization solution.
2. What is the estimated cost and timeline for you to fully implement a modernized tax equalization system (install, customize, configure, and test to production)?
3. What is your data conversion process?
4. What is your solution's ability to integrate with existing architecture/systems?
  - a. Ex: document management and generation systems
5. How is your solution licensed?
6. What vendor support is provided after the solution is installed?
7. Can the customer maintain the solution independently after the solution is installed?
8. What is your solution upgrade process post-installation?
9. What is your solution's ongoing maintenance cost?

#### ***Solution software/security details:***

10. What general platform and computer programming language does your solution use?
11. What internal and external security controls does your solution use?

#### ***Solution capability/feature details:***

12. What are your form intake, review, and processing capabilities?
13. What is your solution's capability to allow a user (county auditor) to audit or adjust a tax form?

14. What is your form adaptability for legislative changes?
15. What features are customizable by the customer without vendor intervention?
16. What is your ability to provide solution upgrades based on user feedback?
17. How user friendly/efficient is your solution?
18. What is your ability to ingest data from external sources?
19. What is your ability to customize and generate reports?
20. What analytics capabilities are available?
21. What are your letter/notification capabilities?
22. What -are your customer online portal/dashboard capabilities, including for both external (county auditors) and internal users (taxation employees)?
23. What are your case management/inventory capabilities including ingesting county auditor correspondence (i.e. documentation uploads, etc.) into automated workflows?

**Other:**

24. Please provide any other relevant solution information that is not detailed above.

**Section IV - Response Details:**

Respondents should note that no contract will be awarded pursuant to this RFI and that responding to, or not responding to, this RFI will neither increase nor decrease any respondent's chance of being awarded a contract from a subsequent solicitation by ODT. Please be advised as well that the contents of your response will be considered public information and will be made available upon request by interested parties.

All responses and other material submitted will become the property of ODT and may be returned only at ODT's option. Proprietary information should not be included in a response or supporting materials because ODT will have the right to use any materials or ideas submitted in any response without compensation to the supplier.

ODT may reject any response if the supplier takes exception to the terms and conditions of this RFI.

***Proposal Format***

Respondents shall adhere to the proposal format provided below, organized by section.

Section 1: Cover letter

Section 2: Table of contents

Section 3: Executive summary

Section 4: Technical description of the solution, including equipment, software, design, and services to be provided, including, as applicable:

- a. System management systems
- b. System event-monitoring systems
- c. Additional subsystems

- d. System design information, including a complete detailed description, block diagrams and network diagrams necessary to provide a complete and comprehensive description

Section 5: Representative project schedule with detailed Gantt chart

Section 6: Representative Resume Samples

Section 7: Additional information not covered in other sections

Section 8: Cost Structure

### ***Clarifications and Additional Information***

ODT may request clarifications or additional information from any respondent that provides a response to this RFI.

ODT may request an interview with and/or oral presentation from any entities that submit a proposal. These meetings provide opportunity for ODT to ask questions and for the proposer to clarify its proposal or demonstrate its product/solution. ODT will schedule these interviews and presentations, in its sole discretion.

### ***Inquiries***

Inquiries regarding this process, the submission of general or specific information, including the need for any information from agency staff, and any and all other questions shall be submitted in writing by way of e-mail only to Kerrie Ryan (Email: Kerrie.Ryan@tax.state.oh.us), and copy William.Ditto@tax.state.oh.us. E-mail format for inquiries is the only acceptable format.

Include:

- “RFI – Modernized Tax Equalization System” as the subject line of your e-mail inquiry.
- Also include in the e-mail: the company name, address, contact name, contact telephone and e-mail address.
- All inquiries should copy William Ditto at William.Ditto@tax.state.oh.us.

### ***Responses***

The agency does not intend to award a contract on the basis of responses, nor otherwise pay for the preparation of any information submitted or for the agency’s use of such information. Acknowledgment of receipt of responses will be made, but respondents will not be notified of the agency's evaluation of the information received.

Please send e-mail responses to:

**Kerrie Ryan**

Ohio Department of Taxation

E-mail: kerrie.ryan@tax.state.oh.us.

Please submit one (1) electronic original Microsoft Word (unprotected) copy and one (1) electronic original Adobe PDF (unprotected) copy of your submission.

E-mail format for responses are the only acceptable format. Include “RFI#1 Modernized Tax Equalization System” as the subject line of your e-mail response. Include the company name,

address, contact name, contact telephone and e-mail in the body of the e-mail. The deadline for written responses is October 16, 2020 at 5:00 PM Eastern Standard Time.