Proposition 19 & Exemptions System RFP# 01-25 - *Questions / Requests for Change*

Ac	Section / Document(s)	Page #	Topic	Question / Request for Change	Rationale	Responsible to Answer	JPA Answer
1	RFP	13	2.1.4.2 County Onboarding Services	RFP states *"The Proposer is expected to provide Onboarding services to each County that considers adopting the Solution. These services are expected to include: 2. County Assessment System Integration; 3. County Configuration: Configuring the Solution to meet any County-specific requirements; 4. Orientation and Training"* . **Q: Can the JPA provide more details of the specific requirements for each county so that Proposers can accurately estimate the level of effort (fixed scope) required to provide the fixed bid proposal requested?** (How many integrations and with what types of systems? Why types of configurations/requirements? How many users to be trained? etc…)	Confirmation of Scope - confirm all requirements and avoiding gaps. Optimized solution value to participating California Assessors through tight alignment of solution cost to value.		The Authority seeks fixed bid proposals for the Solution, including implementation and onboarding services for participating counties. While the specific details for each of the potentially 58 county systems are not fully defined upfront, the Cost Workbook provides assumed county counts for Low, Medium, and High complexity integrations for cost estimation purposes. Proposers are required to propose their approach to county onboarding, define their licensing model including user types and tiers, tailor training plans to different county opt-in levels, and state all pricing assumptions in the Cost Workbook.
2	RFP	9	2.1.1 Potential System Solutions and Hosting Service Delivery Model	The JPA appears to be open to considering custom developed software and custom-coded solutions. These "custom" solutions could make the JPA beholden to only the single vendor that wrote the code for the software as the only entity who understands those custom-developed solutions. **Q: Does the JPA prefer a more "industry standard" solution that can be supported by multiple external vendors (vs. just one) to avoid "vendor lock-in" and better ensure long-term sustainability?**	Cost-effective and flexible long-term solution support for the JPA and participating California Assessors		The Authority is open to considering various solution types, including commercially available products, modular tools, low-code platforms, open source, and custom developed software. To mitigate vendor lock-in and ensure long-term sustainability, the Authority explicitly desires access to all source code, configurations, software, data, environments, and configuration tools, and requires the ability to transition these to a different system integrator upon agreed-to qualifying events.
3	RFP pg. 2 / Cost Workbook Tab 4 - Integrations	2	Pricing of Integrations	The RFP States that *"All tasks associated with the integration services proposed shall be included in the total one-time cost for that service"* . Please provide detais regarding the quantities of integration, names/types/nature of the systems specific to each county with which the Proposer is expected to integrate and price in a fixed price bid. **Q: Can the JPA please provide details regarding these systems (by participating county) so that Proposers may properly and accurately estimate and price the level of effort expected?**	Further detail required to estimate level of effort and price accurately to provide the greatest value to the JPA and participating California Assessors.		While the Authority's vision includes integration with potentially 58 County Assessment Systems, the specific details for each county's system are not fully defined upfront. The Cost Workbook offers assumed numbers of counties for Low, Medium, and High complexity integrations for cost estimation purposes. Proposers should assume that roughly 50% of integrations will be low complexity (e.g., APIs), 35% will be medium complexity (e.g., files transfer), and 15% will be high complexity (e.g., Legacy Data Exchange). Proposers are expected to describe their integration approach and must state all assumptions upon which their fixed bid pricing is determined in the Cost Workbook.
4	Cost Workbook Tab 4 - Integrations		Pricing of Integrations	The RFP indicates that there are three (3) levels of Integration Complexity – *"Low" (e.g., APIs) Qty = 10, "Medium" (e.g., Files) Qty = 7, and "High" (e.g., Legacy Data Exchange) Qty = 3.* **Please provide more detail as to what is meant by "APIs, Files, and Legacy Data Exchange" and the estimated level of effort (scope of work) assumed to be required and other assumptions for each of these categories to enable Proposers to provide a fixed bid for each category of integration.**	Further detail required to estimate level of effort and price accurately to provide the greatest value to the JPA and participating California Assessors.		The terms "APIs, Files, and Legacy Data Exchange" are provided as examples of integration methods corresponding to Low, Medium, and High complexity categories for cost estimation purposes only in the Cost Workbook. The RFP details technical requirements for integration capabilities and supported formats, including REST API, SOAP API, JSON, XML, and CSV files. The specific scope of work and estimated level of effort are to be addressed through discovery and design activities. Proposers are to document any assumptions made for the purposes of scoping/pricing.

5	RFP - Section 3.3 Preferred Qualifications	19	Proposer Qualificiations / Evaluation Scoring	The RFP states: *"Additional points may be given to Proposers that provide a reference that verifies that the Proposer has significant support and/or implementation experience with a property assessment and/or tax system."* While the proposal response evaluation "weighting percentages" are provided in Section 3.4.2, this Preferred Qualifications section is the only area of the RFP where "points" are mentioned as a methoed of scoring proposals. **Q: What is the "points" system being referred to here by which vendor proposals will be evaluated, and how many points (weighting) will be given to Proposers with *"significant support and/or implementation experience with a property assessment and/or tax system"* ?**	Ensure that a clearly defined and objective proposal evaluation methodology is in place for this procurement.		Proposals will be scored and points applied in proportion to the weighting defined in the RFP Section 3.4.2. The "points" or scoring refered to in the Preferred Qualifications section will be applied to Evaluation Criteria 1 - Proposer Company and Staff Experience.
6	RFP - Section 3.3 Preferred Qualifications	19	Proposer Qualificiations / Evaluation Scoring	The RFP states that: *"Additional points may be given to Proposers that provide a reference that verifies that the Proposer has significant support and/or implementation experience with a property assessment and/or tax system."* **Q: Given the complexity and importance of delivering and supporting a solution that simultaneously meets the needs of multiple counties, wil the JPA also consider awarding additional points to Proposers with experience designing, imoplementing, and supporting such multi-jurisdictional data sharing solutions to meet the unique needs of each specific county?**	Better aligning provider experience and credentials to the actual scope of work and desired outcomes of this project. Better position Accenture in credentials.		The Authority seeks a Solution to support multiple counties with varying needs and integration levels. The evaluation includes "Proposer Company and Staff Experience" with a 10% weighting. Proposers are encouraged to describe their experience with multi-county and multi-jurisdictional data sharing solutions within their response to the Vendor Experience Response Template (Template B) as part of this evaluation criterion.
7	RFP - Section 3.4 Evaluation	19	Proposer Qualificiations / Evaluation Scoring	The RFP states: *"Authority representatives will serve as the Selection Committee. Specifically, the Selection Committee will be responsible for the evaluation and scoring of the Proposals and Proposer Demonstrations, and for conducting any interviews."* **Q: What are the objective criteria by which the Selection Committe will evaluate and score proposals? Who is evaluating vendor proposals from a "technical feasibility and solution viability" perspective?**	Ensure that a defined and objective proposal evaluation approach is in place to ensure that a sustainable solution is selected that offers the greatest value to the JPA and participating California Assessors.		The objective evaluation criteria for Stage 1, with defined weighting percentages for categories like Proposer Company and Staff Experience, Business Functionality, Technical Functionality, Implementation, Maintenance and Operations, and Cost, are detailed in Section 3.4.2. Technical feasibility and solution viability are primarily evaluated under the "Technical Functionality" criterion (15% weighting), based on the Proposer's responses regarding technical requirements and approach (Templates D and F). The Authority's Selection Committee, comprised of Authority Business and Technology representatives, is responsible for evaluating and scoring proposals based on these criteria.
8	RFP		Use of Offshore Resources	In the interest of providing the best possible value for California Assessors, we assume that the use of offshore resources will be permitted for, at a minimum, activities where offshore resources would NOT have access to county assessor systems, networks, production data or PII (e.g. non-production system configuration, testing, documentation, securing the portals in development, etc...) provided that proper security measures are in place to prevent network and production data access from outside the United States. **Request: Please confirm this.**	Provide the greatest value and quality assurance to the JPA and participating State of California Assessors while maintaining appropriate data and system access security.		The RFP mandates that data associated with the Solution must be housed onshore in the US, and emphasize adherence to strict security and confidentiality standards. Proposers should clearly describe their proposed work locations and staffing model, including any use of offshore resources, within their response (Templates B and C), explaining precisely how all data residency and security requirements will be met.

9	RFP	10	2.1.2 Functional Scope	RFP states: "The system must also be flexible and extensible to meet future functional scope. **Q: Can the JPA please define what future functional scope is anticipated?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		While this future functional scope is not yet defined and may be driven by changes in the external environment, Proposers should demonstrate how their proposed Solution meets the current scope while being designed for future extensibility.
10	RFP	13	2.1.6 Support Models	RFP States "Tier 1 support (e.g., initial contact with users and basic troubleshooting) will likely be provided by resources within each County that utilizes the Solution as determined during the County Consultation portion of the County onboarding process. " **Request: Please confirm the counties for which Tier 1 support is expected to be provided by the Proposer.**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		This is a detail to be determined during the individual County onboarding process. Document any assumptions made for the purposes of scoping/pricing.
11	RFP	14	2.2.1. Overview of Tasks	RFP States: *"This includes the development and deployment of "County-side" interfaces chosen by each/any individual participating counties at the time of original Solution deployment"* . **Q. Please clarify whether the scope of this project includes developing county-side interfaces and deploying them within each county's infrastructure?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.	Technical Subject Matter Experts	Confirmed. Section 2.2.1 Task 6 - Deployment includes the quoted reference. In context, the referenced text refers to interfaces being developed and deployed in coordination with individual participating counties after further discussions and decisions have occured.
12	RFP		Address Validation	**Is the address validation at the level of USPS standard addresses or, for example, the current title ownership of the property?**		Business Subject Matter Experts	The System is required to have the capability to integrate with the Postal Service System (to validate address) or a vendor provided address verification module. (Requirement T1.4)
13	RFP	14	2.2.1 Overview of Tasks - Task 2 – System, Interface and Data Conversion Design	**What data is required to be converted and how much data will be converted by county? What are the sources of the data to be converted? Are there some other tech solutions that could be used as a starting point for requirements/ seeing how use cases are implemented today from an example perspective?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		The scope includes data conversion from potentially 58 County Assessment Systems, with imported data including elements such as APN, situs addresses, owner names, owner addresses, property use codes, value history, and sale history. The specific quantity of data to be converted per county is to be addressed through discovery and design activities. Proposers are to document any assumptions made for the purposes of scoping/pricing. Proposers should consider Attachment 5 – Assessor Process Flows and Attachment 6 – Assessor Use Cases as starting points for understanding requirements and current processes.
14	3.7 Attachment 7		Service Levels	The Service Levels (SLAs) indicated are non-standard for the industry (shorter than industry response times and 24/7 vs. business hours), which will result in higher than necessary costs from bidders to cover the financial costs of higher than standard performance guarantees. **Q: Is the JPA willing to negotiate these SLAs in the interest of providing better value to the participating California Assessors on this project?**	Provide better alignment of cost to value by better aligning SLAs to business risk (ie: Avoiding the State Assessors "paying too much for "solution performance insurance")		The Service Levels outlined in Attachment 7 are proposed. Following the selection process, the Authority staff shall commence contract negotiations with the recommended Proposer. The selection of a proposal shall not imply acceptance by the Authority of all terms, and these terms may be subject to further negotiations and approvals.
15	3.7 Attachment 7		Service Levels - Availability and Performance Services SLRs	Availability and Performance Services SLRs - A "daily" availability measurement window is not industry standard and highly restrictive. **Q: is the JPA willing to consider changing this to a more industry standard "monthly" measurement window?**	Provide better alignment of cost to value by better aligning SLAs to business risk (ie: Avoiding the State Assessors "paying too much for "solution performance insurance")		Addressed above.
16	3.7 Attachment 7		Service Levels - Availability and Performance Services SLRs	Industry standard availability for most major cloud providers is no higher than 99.95%, with higher levels requiring significant additional cost (if available) **What is the business reason for this 99.99% non-standard availability SLA? Would the JPA consider changing this to a more industry standard 99.95%?**	Provide better alignment of cost to value by better aligning SLAs to business risk (ie: Avoiding the State Assessors "paying too much for "solution performance insurance")		Addressed above.

17	3.7 Attachment 7		Service Levels - Availability and Performance Services SLRs	**Request: Please acknowledge and confirm those situations impacting system availability that would be beyond the control of the contractor** (e.g. local Network Issues, Natural Disasters, Power Outages, Cyber Attacks, Regulatory Changes, Human Error, etc..)	Provide better alignment of cost to value by better aligning SLAs to business risk (ie: Avoiding the State Assessors "paying too much for "solution performance insurance")		Addressed above.
18	RFP		Forms	It is our understanding that the system will rely on forms published by the CA Board of Equalization (https://www.boe.ca.gov/proptaxes/bpf.htm). **Q: What forms, specifically, should be included in the system** (EX: BOE-19-B, BOE-19-D, BOE-19-DC, BOE-19-G, BOE-19-P and BOE-19-V) **for the Prop 19 portion of the portal? What else? What about the property tax exemption portion of the portal?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.	Business Subject Matter Experts	Additional information regarding the expected forms can be found on the BoE Website - https://www.boe.ca.gov/prop19/ and https://www.boe.ca.gov/proptaxes/exempt.htm. Also, see Functional Requirement E1.16.
19	RFP		Forms	There are almost 40 forms on the BOE website from BOE-260 -BOE270 series that appear to be relevant to the property tax exemptions requests. **Q: Is the portal expected to support all of the ~40 forms on the BOE website? How many E-filing/Forms are expected to be available on the new Portal?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.	Business Subject Matter Experts	Additional information regarding the expected forms can be found on the BoE Website - https://www.boe.ca.gov/prop19/ and https://www.boe.ca.gov/proptaxes/exempt.htm. Also, see Functional Requirement E1.16.
20	RFP		Forms	The RFP states that counties can customize their forms. **Is this customization cosmetic only? Is this intended to mean that each county can add their own logo and contact information but cannot change the data fields that appear on the portal?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.	Business Subject Matter Experts	Yes, only the logo and contact information can be changed by an individual county.
21	RFP		Data Storage & Processing	**Who is setting/will set the standards for the storage and processing of system data? Does the JPA have a data governance strategy or is the vendor expected to establish and manage this?**	County assessors have a variety of ways that they are storing & processing data that will interact with the portal. Some counties use Megabyte Systems or Aumentum Technologies systems while others use Excel, Access or paper files. A standardized set of data elements for each component of the portal must be established so that it can be used by all participating counties, no matter what their internal systems use.		The Authority requires that data associated with the proposed solution be housed onshore (in US). The Authority desires access to all data and the ability to transition it. The RFP calls for Proposers to detail their technical approach, including a Secure Data Repository. A Security Policy (Exhibit H) is expected to be part of the resulting contract.
22	RFP		Fraudulent Claims Management	**Do you expect to have fraudulent claims filed? If so, is the system supposed to flag them or simply route them through to the county for processing? If a DoS attack occurs, can the system be disabled?**	Confirmation of Scope and Security	Business Subject Matter Experts	Assessor staff to process all claims submitted and as part of the processing will determine validity. Look for DoS requirements attached in T&Cs and Technical reqs
23	RFP		Funding of Future Enhancements	At the Assessor's IT conference, Mr. Kissinger presented how future enhancements could be requested for the JPA Portal. **How would you expect those to be funded, particularly if the new functionality is not within scope of the RFP?**	Ensure program sustainability	JPA PM	Attachment 3 - Contract Terms & Conditions outlines a process for handling "Additional Work" or requested changes to the Project and Contract Documents. If changes are warranted, the Provider is to outline them, including estimated changes to the Scope of Services and Fee Schedule. An amendment to the Agreement shall be prepared by the Authority and executed by both parties before any change becomes binding, and material amendments to the Fee Schedule may be subject to Authority Council approval.
24	RFP		PII Data	There is PII on the forms that will be entered on the portal. **Q: What security controls should the system follow?** (NIST 800-53 and IRS Publication 1075 are standard in other areas of tax administration.)	Ensuring that proper Data Security controls are in place comensurate with the sensitivity of data		The RFP calls for Proposers to describe their technical approach to a Secure Data Repository, Identity and Access Management, and secure Document Uploads in Template F. Regulatory & Security Requirements are laid out in Template D - Requirements Response Matrices (e.g., Requirement T3.7). As outlined in Attachment 3 - Contract Terms & Conditions, the resulting agreement will include a Security Policy as Exhibit H.

25	RFP	22	4.5 Proposal Package Format and Content	Multiple response templates state *"Responses to individual questions within each response template should not exceed one (1) page in length."* **Q: For templates containing this requirement, if there are multiple requirements to be addressed in a numbered requirement, can the one page limit apply to each separate requirement so that sufficient detail can be provided for those evaluating response and proposals?** For example, in Question 1 Technical Requirements in Template F – Technical Approach Response Template, the one page limitation would apply separately to each of the 11 subpart requirement questions: • Web Portal User Interface • Identity and Access Management (internal and external users) • Form Management • Address Verification • Document Uploads • Electronic Signature Platform • Workflow Management (screens and human tasks) • Secure Data Repository • Enterprise Integration Platform • Automated Instant Messages / Emails • Reporting and Dashboarding	It is in the best interest of the JPA and participating California Assessors in this project that bidders be enabled to provide sufficiently detailed responses to each question such that the most well informed evaluation of proposals and selection of a solution can be provided.		The one-page guidance is intended to promote concise responses. If content exceeds one page due to complexity, the Authority will permit brief, focused extensions. Responses should remain as concise as possible while fully addressing the requirements. In the case of Template F - Technical Approach question 1, it is acceptable to interpret the expectation as providing a one-page response for each of the 11 capabilities described in the section.
26	RFP	N/A	JPA Governance Before and After go-Live	**Request: Please clarify the governance for this program before an after go-live, including who has final decision authority for issues, risks, and escalations.**	There are a number of items in the RFP where there is risk of substanital scope increases (such as adding other counties); we would like to know the process for resolving those items and how we would be engaged in that process.	JPA PM	As described in section 5.3 of the RFP, the First Level of decision authority for escalations, issues, and risks is the Authority Project Manager(s) designated for the Proposition 19 & Exemptions System project. The second level of decision authority is the Authority Executive Director. The governance for this program will be further developed and finalized prior to a selected vendor commencing work.
27	RFP	N/A	JPA Governance Before and After go-Live	**Q: Is the JPA seeking a vendor-proposed governance model for this project as part of project scope?**	Establishing a clear governance model, including working principles and the process for managing major decisions is essential to successfully onboarding nearly 3 dozen different counties with unique and sometimes competing needs, managing costs, controlling for conflicts, and even managing onboarding of later counties.	JPA PM	The RFP requests Proposers describe their approach to project management, checkpoints, and reporting as part of the Implementation Approach, and their staffing organizational plan. However, the Authority is not explicitly requesting the vendor to propose the overall program governance model for the Authority's management of the project and solution lifecycle.
28	RFP	11	Document Uploads	**What (if any) solution exists today for scanning the documents for sensitve information or will vendors be expected to provide that solution?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		The Authority is not explicitly requiring this specific scanning function for sensitive information as part of the solution. Data security/handling requirements for the system are listed on the Technical Requirements Tab of Template D (T3.1 - T3.8).
29	RFP	11	Document Uploads	**Are the uploaded documents expected to be scanned and classified? If so, is there an existing tool that vendors will be expected to use for this or are vendors being expected to provide this tool?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		Requirement F3.7 mandates that the System extract and populate claim template fields from uploaded documents, implying the need for document classification and data extraction tools, which vendors are expected to propose and provide.

30	RFP	16	Testing Tools	**Can vendors bring their own tools for testing any code or configuration of the portal on a regular basis, or is there an existing tool for static and dynamic testing that the JPA prefers to be used?**	Confirmation of JPA's desired approach		The RFP explicitly asks Proposers to describe their approach to utilizing automated testing tools, including the specific tools they will use. The Authority expects vendors to propose and bring their own tools and methodology for testing the solution code and configuration.
31	RFP	11	System Access Management (IAM)	**For Identity & Access Management, will a registration or enrollment process (with consent and preferences of the end user) be required and will user profiles be managed with personas/roles?**	Confirmation of JPA's desired system and data access management approach		The System is required to provide robust user authentication and manage user accounts, including the configuration of users, roles, responsibilities, and credentials, to ensure only authorized individuals have access. Requirement T3.16 describes that "The System shall be capable of implementing Role-Based Access Control (RBAC)."
32	RFP	11	System Access Management (IAM)	**Can we assume that Multi-Factor Authenticaion and self-service password reset are required?**	Confirmation of JPA's desired system and data access management approach		Requirement T3.23 describes expectations related to self-service password reset and multi-factor authentication.
33	RFP	21	3.5 Intent to Award and Contract Negotiations; Other Terms and Conditions	**How would the JPA prefer that bidders present their redlines and/or proposed changfes to the terms outlined in Attachment 3 as part of their responses to the RFP?**	To have clear understanding of the contract negotiation process and its timeline		The final contract will be based substantially on Attachment 3 and negotiated with the selected Proposer. Vendors should note any significant exceptions or modifications in their proposal and include any related pricing assumptions.
34	Attachment 3.3	5	Section 10 Data Security mentions Exhibit “G” (“Security Policy”). However, Exhibit G has not been provided.	**Request: Please provide Exhibit G or clarify at what stage of the contract negotiation it will be provided.**	To have clear understanding of the contract negotiation process and its timeline	JPA PM	The Authority will finalize Exhibit G during contract negotiations with the selected Proposer.
35	2.2.2 Implementation Deliverables	15	Deliverable 1	**Request: Please provide more details on your expectations for Organizational Change Management for such a complex implementation.** These would include but not be limited to Readiness Measurement, Change Analytics, and Digital Adoption.	Managing onboarding and change for multiple counties can get very complex and costly. We have discovered that digital and analytics tools can manage that complexity while providing real, validated data about readiness and adoption. We would like to include these services, but are conscious that JPA may have their own and would seek to leverage those.		The Authority expects Proposers to detail their implementation approach, including how they will manage the work and roll out user functionality across counties, which inherently involves change management to ensure successful county adoption. Proposers should propose a comprehensive plan in their Implementation Approach and Staffing Plan that supports county onboarding by addressing change readiness, training and adoption.
36	RFP Section 2.2.2 Task 6	16	Reports	**How many Reports and Dashboards are to be created? and of what type?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		The System must support reporting and dashboards for state reporting, cross-county functions, external stakeholders, and county operations. Proposers should describe their solution’s capabilities and include any assumptions made regarding report volume or complexity.

37	RFP		County-specific support scope	**Are County Active Directories the same across all counties? Are there anticipated development changes on the County side to conform to Portal standards? Will these required changes be expected to be in the Contractor's scope?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.	Technical Subject Matter Experts	Each County uses their own Active Directory with no anticipated major changes on the County side of how they manage user identities, which are used across the county beyond just this project. Vendors are encouraged to propose a solution consistent with the stated technical requirements, and that the Vendor believes will best serve the Authority's goals.
38	RFP	1	Compliance	**What are the ADA compliance requirements?**	Confirmation of Scope to ensure the greatest value to the JPA and California Assessors participating in this project.		Yes, see Requirement T3.11