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August 6, 2026

VIA Electronic Mail

The California County Assessors'
Information Technology Authority
1221 Oak St, Ste 145,
Oakland, CA 94612
info@ccaitjpa.org

RE: **Just Appraised, Inc. Protests The California County Assessors' Information Technology Authority's Award of the Proposition 19 & Exemptions System Contract Under RFP No. 01-25 to Oracle America, Inc.**

Dear California County Assessors' Information Technology Authority Board:

Just Appraised, Inc. ("Just Appraised"), by and through its undersigned counsel, hereby respectfully protests The California County Assessors' Information Technology Authority's (the "Authority") award of the Proposition 19 & Exemptions System Contract to Oracle America, Inc. ("Oracle").

I. INTRODUCTION

Just Appraised is a local, California-based, GovTech company that provides AI-powered software to help local government offices—particularly county assessors and clerks—automate property tax administration, deed processing, valuations, and citizen service workflows, improving efficiency and accuracy. Just Appraised submitted a proposal in response to RFP No. 01-25 ("RFP" or "Solicitation"), and this protest arises from the Authority's failure to evaluate proposals in accordance with evaluation criteria established in the RFP, its improper reliance on unstated evaluation considerations, and its failure to conduct or document a rational best-value determination, resulting in the improper selection of Oracle's substantially higher-priced proposal. The RFP established a weighted best-value procurement in which cost accounted for twenty percent of the overall evaluation and proposals were to be evaluated solely under the published criteria. Yet, the Authority publicly represented that Oracle submitted the lowest-priced proposal, despite Just Appraised's proposal being approximately $7 million less expensive over the evaluated ten-year period, and repeatedly justified its selection based on Oracle's existing Los Angeles County implementation—a consideration that was never identified as a separate or predominant evaluation factor in the RFP. The Authority also has not disclosed any evaluation or source selection record demonstrating that it evaluated cost as required, conducted the required tradeoff analysis, or otherwise supported its conclusion that Oracle represented the "strongest overall value." Finally, the public record indicates that material aspects of Oracle's proposal remained under negotiation at the time of the award decision, calling into question whether the Authority could reasonably determine that Oracle offered the best value under the Solicitation. Accordingly, this protest should be sustained.

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II. PRELIMINARY MATTERS

A. Protester Information.

Just Appraised, Inc.
2261 Market Street No. 4074
San Francisco CA, 94114

B. Government Entity.

The California County Assessors'
Information Technology Authority
info@ccaitjpa.org

C. Interested Party.

Just Appraised, Inc. is an interested party, as it submitted a proposal in response to the Authority's RFP on or about June 27, 2025. The Solicitation provides in pertinent part that "any Proposer that has submitted a Proposal and believes that Authority has incorrectly selected another Proposer for award may submit a written notice of protest." Ex. A at 28.

D. Jurisdiction.

The Authority has exclusive authority to consider bid protests arising from this procurement. Section 6 of the RFP requires the Authority to receive a protest "on or before the fifth business day after Authority's issuance of the notice of intent to award." Ex. A at 28. Further, the RFP provides that to the extent permitted by law, strict compliance with the procedures and time limits set forth in this section are mandatory and are Proposers' sole and exclusive remedy in connection with this section's subject matter..[and] failure to comply with the procedures and time limits set forth in the section constitute a waiver of any right to further pursue a protest, any legal action, or relief that arises out, relates to, or is incident to this RFP." *Id*. Accordingly, Just Appraised is entitled to file this protest with the Authority.

E. Timeliness.

This Protest is timely. The RFP provides, in pertinent part that "[u]pon the conclusion of negotiations with a Proposer that results in a proposed agreement for the contract solicited in this RFP that are acceptable to Authority as to price and all other terms, Authority shall issue notice of intent to award the contract solicited in this RFP to a Proposer, and such notice shall be directed to each entity that submitted a Proposal. Within five business days of Authority's issuance of a notice of intent to award the contract, any Proposer that has submitted a Proposal and believes that the Authority has incorrectly selected another Proposer for award may submit a written notice of

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Protest." Ex. A at 28. The Authority has not yet issued a notice of intent to award the contract solicited under this RFP ("Contract") to Just Appraised, and therefore, this Protest is timely submitted.

II. FACTUAL BACKGROUND

On or about April 28, 2025, the Authority issued the RFP to procure a statewide, cloud-based Proposition 19 and Property Tax Exemptions System to modernize and standardize the administration of Proposition 19 claims and property tax exemption claims across California. Ex. A at 2. The RFP seeks a Software-as-a-Service ("SaaS") solution that will provide a centralized platform for all participating county assessors to process Proposition 19 base-year value transfer claims and property tax exemption claims, facilitate cross-county communication and data sharing, permit taxpayers and other claimants to submit applications electronically, and support required reporting to the California State Board of Equalization ("BOE") and the California Department of Tax and Fee Administration ("CDTFA"). *Id*. at 1. The proposed solution consists of two integrated components: (1) a Proposition 19 portal for taxpayers and county assessors to submit, process, and exchange information relating to Proposition 19 claims; and (2) a property tax exemptions portal through which homeowners, nonprofit organizations, schools, churches, affordable housing providers, museums, and other eligible entities may electronically submit exemption applications and communicate with county assessor offices. *Id*. at 6.

Additionally, the selected proposer is required to provide the software platform, cloud infrastructure, implementation services, system design and configuration, interface development with county assessment systems, data conversion, testing, user training, county onboarding, and ongoing maintenance and operations support under the RFP. *Id*. at 8. The RFP also contemplates deployment of a scalable statewide solution capable of serving all 58 California counties through varying implementation models, ranging from basic electronic filing capabilities to fully integrated, bi-directional interfaces with individual county assessment systems. *Id*. at 14.

Just Appraised timely submitted a proposal on or about June 27, 2025. With respect to proposal evaluation, the RFP contemplates award to the "best overall solution" to the Authority, inclusive of cost considerations. Ex. A at 28. 18. The RFP established a two-stage evaluation process for all proposals that satisfied the Initial Screening and Minimum Qualification requirements. *Id*. During the Initial Screening, Authority staff reviewed each proposal for responsiveness and acceptability, including proposal completeness, compliance with the required format, satisfaction of the minimum qualification requirements, and verification of references. *Id*. The Initial Screening was conducted on a pass/fail basis only, and proposals that failed to satisfy these threshold requirements were deemed ineligible for further evaluation. Just Appraised advanced past the Initial Screening phase. *Id*.

Proposals that successfully passed the Initial Screening advanced to the Authority's formal evaluation process, which was conducted in two stages by a Selection Committee comprised of representatives with experience in property assessment and software implementation and maintenance. *Id*. at p. 19. During Stage 1, the Selection Committee evaluated the written proposals submitted in response to Templates B through I of the RFP. *Id*. The written proposal evaluation consisted of the following six weighted evaluation factors:

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Stage 1 Evaluation Factor	Weight	Evaluation Criteria	RFP Templates
Proposer Company & Staff Experience	**10%**	Evaluates the proposer's organizational background, experience, proposed project organization, and qualifications of key personnel assigned to the project.	Template B – Proposer Experience; Template C – Staff Experience
Business Functionality	**25%**	Evaluates the proposer's responses to the functional requirements and its overall functional approach to meeting the Authority's business needs.	Template D – Functional Requirements Matrix; Template E – Functional Approach
Technical Functionality	**15%**	Evaluates the proposer's responses to the technical requirements and its proposed technical approach, including system architecture and technical capabilities.	Template D – Technical Requirements Matrix; Template F – Technical Approach
Implementation Approach	**15%**	Evaluates the proposer's methodology for implementing the statewide solution, including project planning, deployment, and execution.	Template G – Implementation Approach
Maintenance & Operations	**15%**	Evaluates the proposer's maintenance and operations capabilities, including support model, service levels, and long-term operational approach.	Template D – M&O Requirements Matrix; Template H – Maintenance & Operations Approach
Cost	**20%**	Evaluates the proposer's total cost of ownership, including implementation services and long-term costs reflected in the Cost Workbook.	Template I – Cost Workbook

Id. at pp. 19-20. On August 8th, 2025, the Authority published that Just Appraised advanced to Stage 2 of the formal evaluation, along with Oracle and Tyler Technologies. Ex. B at 1.

Under Stage 2, the RFP contemplates the proposers conducting software demonstrations, presentations, and selection interviews. *Id*. at 20-21. According to the RFP, the Authority evaluated each invited proposer based upon its demonstration, presentation, and interview responses. *Id*. at 20. The RFP identified several factors to be considered during Stage 2, including the proposer's understanding of the Authority's business environment and project scope; the quality and completeness of its project plan; its approach to business process improvement and change management; its proposed data interoperability strategy; its risk mitigation methodology; its training plan; and its proposed technology platform and architecture. *Id*. Additionally, "[s]cores from Stage 1 of the evaluation will be updated during Stage 2. *Id*. at p. 19. On October 21, 2025, the Authority published that three Proposers were advancing to the finalist round. Ex. C at 1.

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Following the completion of Stage 2 evaluations, the RFP provides that "the Selection Committee will recommend a Proposer to the Board, who will determine the selected Proposer with whom Authority staff shall commence contract negotiations." Ex. A at 19 stating that (the highest scoring Proposer in Stage 2 will be invited to enter contract negotiations with the Authority.) On February 13, 2026, the Authority notified Just Appraised that it has advanced to contract negotiations. *See* Ex. D at 1. On or about July 28, 2026, Just Appraised became aware that Oracle was the awardee, and attended the Authority's board meeting on June 30, 2026 to understand the Authority's award rationale.

III. LEGAL GROUNDS FOR PROTEST

Just Appraised protests the Contract award on the following grounds:

A. The Authority Failed to Properly Evaluate the Cost Criterion in Accordance with the RFP.

The RFP expressly assigned "Cost" a weight of twenty percent (20%) of the overall evaluation and required each proposer to submit a completed Template I – Cost Workbook identifying the total cost of ownership for the proposed solution and implementation services. Ex. A at 20. Cost was therefore a significant evaluation criterion that the Authority was obligated to apply in accordance with the methodology established in the Solicitation. The Authority could not diminish the importance of the Cost factor, disregard the published weighting, or evaluate price using criteria not disclosed in the RFP.

Based on the existing procurement record, the Authority does not appear to have meaningfully evaluated costs in the manner the RFP prescribed. During the public meeting to approve the Ad Hoc Committee's recommendation to adopt an Intent to Award a contract to Oracle, the Authority announced that Oracle's proposal reflected a negotiated ten-year cost of approximately **$17.047 million** and further represented that Oracle **was the lowest-priced proposal** offering the most reasonable long-term operations and maintenance costs.

These statements are inconsistent with the record. Just Appraised's proposal was valued at approximately **$7 million less** than Oracle's proposal over the same evaluated time-period. Therefore, Oracle's proposal was materially more expensive and should have been evaluated accordingly under the RFP's Cost criterion. At present, however, the Authority has not provided an explanation of how Oracle's cost was evaluated. If the Authority evaluated Oracle's proposal favorably on the basis that it offered the lowest price, that evaluation necessarily influenced the procurement decision, particularly because cost was assigned the second-highest weight under the RFP.

The Authority likewise has not disclosed the evaluators' cost worksheets, consensus scoring documents, numerical cost scores, or any contemporaneous documentation demonstrating that the cost criterion received the twenty-percent weight assigned by the RFP. Without those materials, Protester cannot

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determine whether the Authority meaningfully evaluated cost or instead effectively reduced or disregarded one of the solicitation's principal evaluation factors.

Accordingly, Protester requests production of the complete record relating to the evaluation of cost, including the cost evaluation methodology, evaluator worksheets, consensus scoring documents, numerical cost scores, and any documentation demonstrating how the Authority evaluated the cost criterion. If those materials establish that the Authority failed to evaluate cost in accordance with the RFP, improperly altered the relative weight assigned to cost, or otherwise departed from the published evaluation methodology, the Authority should sustain this protest.

B. The Authority Improperly Relied on an Unstated Evaluation Criterion by Elevating Oracle's Existing Los Angeles County Implementation Into the Predominant Basis for Award.

The Authority's recommendation demonstrates that Oracle was selected not because it received the highest evaluation score under the criteria set forth in the RFP, but because Oracle had already implemented its solution in Los Angeles County, and the intellectual property associated with that Los Angeles County implementation could be replicated for counties this procurement contemplates. These considerations became the centerpiece of the Authority's award decision even though the RFP did not identify them as separate evaluation criteria or indicate they would receive determinative weight.

The Recommendation of Intent to Award repeatedly emphasizes Oracle's "proven production experience in Los Angeles County," the existence of an already-deployed solution, "reusable artifacts," "configuration components," the resulting reduction in implementation risk and accelerated delivery schedule as the principal reasons Oracle allegedly provided the "strongest overall value." *See* Exhibit D. Specifically, the recommendation states that Oracle's existing Los Angeles County implementation provides "reusable artifacts (use cases, test cases, FAQs, workflows, and configuration components) that significantly reduce customization risk and accelerate delivery." *Id*. The Board presentation likewise repeatedly characterized Oracle's existing Los Angeles County deployment as a principal discriminator, explaining that Oracle was selected because of its "proven production experience in Los Angeles County," its reusable implementation approach, and its existing platform that could be leveraged across all 58 counties.

Nothing in the Authority's public evaluation criteria advised offerors that ownership of an existing California county implementation—or reusable implementation artifacts from such a deployment—would function as a separate or dominant evaluation factor. To the contrary, the Authority represented during the procurement that proposals would be evaluated under the weighted criterial set forth in the RFP. When bidders sought clarification regarding how "experience" would be evaluated, the Authority expressly responded that any additional points would be applied within the published "Proposer Company and Staff Experience" criterion, which carried only a 10% weighting. *See* Ex.F at No. 5 (Accenture Q&A No. 5).

The award rationale, however, demonstrates that Oracle's prior Los Angeles County implementation permeated the evaluation far beyond a ten percent experience consideration. Rather than explaining how

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Oracle prevailed under each published evaluation criterion, the Recommendation repeatedly returns to Oracle's existing deployment, reusable artifacts, implementation acceleration, and reduced customization risk as the overarching justification for selection.

California law prohibits precisely this type of evaluation. An agency must evaluate proposals in accordance with the criteria disclosed to all offerors and may not materially alter the basis for award after proposals have been submitted. *See Konica Business Machines U.S.A., Inc. v. Regents of University of California*, 206 Cal. App. 3d 449 (1988), (holding that an agency could not effectively award a contract based on considerations not clearly disclosed in the solicitation because doing so forces bidders to "guess what will satisfy" the agency's actual requirements).

Here, the Authority effectively created a *de facto* evaluation factor favoring the one proposer that happened to possess an existing Los Angeles County implementation. By elevating Oracle's preexisting implementation and reusable intellectual property into the principal justification for award, the Authority materially increased the importance of considerations that were not disclosed to offerors as independent or predominant evaluation factors. Because the Authority's award determination rested on a materially different basis than the one described in the RFP, the Authority should sustain this protest.

C. The Authority Failed to Document a Rational Best-Value Determination Supporting Award to Oracle.

Even assuming, *arguendo*, the Authority properly evaluated each proposal under the published evaluation criteria, the procurement record does not demonstrate that the Authority performed the independent best-value analysis necessary to justify selecting Oracle's materially higher-priced proposal.

The RFP established a “best overall solution”/best-value procurement in which proposals would be evaluated under weighted criteria and the highest-scoring proposer would be recommended for contract negotiations. Implicit in that process is the requirement that the Authority articulate a reasoned basis for selecting a higher-priced proposal where the perceived technical or qualitative benefits warrant the expenditure of additional public funds.

Here, the Authority's public explanation consisted almost entirely of generalized statements that Oracle offered the "strongest overall value," possessed production experience in Los Angeles County, proposed a phased implementation approach, utilized Oracle Cloud Infrastructure, and addressed the Authority's needs for all fifty-eight counties. While these statements describe characteristics of Oracle's proposal, they do not explain why those characteristics warranted selecting Oracle over Just Appraised, despite the substantial price differential. Nor did the Authority publicly identify any comparative analysis of the competing proposals, discuss their respective strengths and weaknesses, or explain how Oracle's purported technical advantages outweighed Just Appraised's significantly lower cost.

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Indeed, the Authority has not disclosed the consensus evaluation report, source selection decision, tradeoff memorandum, or any other contemporaneous document demonstrating that it performed a qualitative comparison of the competing proposals before concluding that Oracle represented the best value. Instead, the Authority repeatedly relied on the conclusory phrase "strongest overall value" without identifying the analytical process that led to that determination. Such generalized assertions are not a substitute for a documented source selection decision grounded in the evaluation record.

The absence of a documented tradeoff analysis is particularly significant where the Authority selected a proposal that Just Appraised understands to be materially more expensive than its own. Although a best-value procurement does not require award to the lowest-priced proposer, it does require a reasoned explanation demonstrating why the selected proposal's additional benefits justify the additional cost premium. Based on the current record, no such explanation has been provided.

Accordingly, Just Appraised requests that the Authority produce the complete source selection record, including any best-value determination, tradeoff analysis, source selection memorandum, evaluation summaries, and other documents contemporaneously relied upon by the Selection Committee or the Board in concluding that Oracle represented the "strongest overall value." If no such contemporaneous documentation demonstrates that the Authority performed a rational best-value determination consistent with the RFP, this protest should be sustained.

D. The Authority Could Not Rationally Determine that Oracle Offered the "Best Value" Because Material Terms of Oracle's Proposal Remained Under Negotiation.

The RFP established a structured procurement process under which proposals would be evaluated, scored, and ranked before the highest-scoring proposer would be invited to enter contract negotiations. Although the Authority retained discretion to negotiate final contract terms with the selected proposer, the RFP contemplated that the award decision would be based upon the proposal that had been evaluated under the published criteria—not upon material proposal revisions or contractual commitments developed through post-selection negotiations.

The public record demonstrates, however, that at the time the Authority voted to issue its Notice of Intent to Award, numerous material aspects of Oracle's proposal remained unresolved. During the public meeting, Authority representatives repeatedly acknowledged that Oracle was continuing to negotiate the project scope, implementation schedule, and detailed deliverables. The Board was informed that Oracle was "still drilling very deeply down in the scope of work as well as the schedule," that the contract remained "under final negotiation," and that Oracle had until the close of business on August 3, 2026 to submit its final contract documents, notwithstanding that negotiations with Oracle have been ongoing for nearly a year.

The Authority further acknowledged that critical implementation documents had not yet been completed. The Project Manager explained that the finalized contract package would include a detailed scope of work, work breakdown structure ("WBS"), project schedule, budget, deliverable-by-deliverable success

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criteria, and implementation milestones—documents that were not yet available because negotiations remained ongoing. Indeed, the Board was advised that these materials would not exist until Oracle submitted its final contract package.

The incompleteness of Oracle's proposal was further reflected in the Board's discussion concerning implementation. Members of the Board questioned how they could approve an award where there was "no time yet of implementation other than sometime in 2027," and expressed concern that the Board had not yet reviewed the final contract. Notably, “Implementation Approach” represents 15% of the weighted evaluation criteria. Another Board member similarly objected that the Board was being asked to authorize the award without having seen the contract itself. Authority representatives acknowledged that the agreement remained under negotiation and that the final contract—including the negotiated scope, schedule, performance provisions, and termination rights—would not be presented until the subsequent Board meeting.

These admissions undermine the Authority's repeated assertion that Oracle had already been determined to provide the "strongest overall value." A meaningful best-value determination necessarily requires evaluators to compare complete proposals against one another using the published evaluation criteria. Where significant elements of one offeror's implementation approach, project schedule, deliverables, and contractual commitments remain subject to ongoing negotiation, the Authority cannot reasonably conclude that it has completed a final comparative evaluation. Nor can competing proposers meaningfully assess whether Oracle ultimately made material improvements to its proposal during negotiations when the opportunity to make such material improvements was not available to other competitors.

The Authority's public statements therefore create a substantial question as to whether Oracle's proposal, as ultimately negotiated, differs in material respects from the proposal evaluated by the Selection Committee. If Oracle was permitted to supplement, refine, or materially improve its implementation approach, project schedule, deliverables, maintenance obligations, or other evaluated aspects of its proposal after the competitive evaluation concluded, the procurement process ceased to be one in which all proposers competed on equal terms, thereby undermining the Authority’s bust overall value determination. Considering the foregoing, this protest should be sustained.

IV. REMEDY

For the reasons stated above, Just Appraised urges the Authority to sustain this protest and take appropriate corrective action. This includes terminating or halting the award of the Contract to Oracle, reopening discussions with all Proposers, requiring proof of conformance with the solicitation’s evaluation criteria, process and law; and issuing a new contract award to the Proposer who best meets the evaluation factors set forth in the RFP.

V. REQUEST FOR DOCUMENTS

Just Appraised requests for copies of the following documents to be produced, regardless of the type of media (electronic, hard copy, etc.), relating to:

A. Any and all documents relating to the government’s evaluation of Oracle and Just Appraised’s

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proposal, including but not limited to, any evaluator's notes, interim evaluations, draft evaluation reports, briefings, communications between or among individuals involved in the evaluation and the source selection decision, and all documents given to Project Manager and any Authority board member about the evaluation;

B. Any and all proposal documents submitted by the awardee and any related documents, including attachments, revisions, clarifications, discussions, and correspondence to and from the awardee and the government at any stage of the procurement;

C. Any and all documents used, referred to, or related in any way to each and every briefing given to the Contracting Officer regarding this procurement;

D. Any and all documents relating to the award decision;

E. Any and all documents that are relevant to any of the stated protest grounds.

Dated: August 6, 2026

By: _____

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California County Assessors' Information Technology Authority

REQUEST FOR PROPOSALS FOR
Statewide Solution: Proposition 19 & Exemptions System
RFP# 01-25
CONTACT: Matt Kissinger, Project Manager, matt.kissinger@ccaitjpa.org, (727) 204-4203

Background

The California County Assessors' Information Technology Authority (Authority) was created in November of 2022 as Joint Powers Authority (JPA) for the purpose of implementing the 2022 Budget Act appropriation under RTC 95.60 - County Assessors Grant Program: assistance to county assessors with technology investments. Property owners, as well as the Authority and local government benefit when county assessors can fairly, accurately and expeditiously assess property for property tax purposes.

Through a Statewide Proposition 19 & Exemptions System, the Authority seeks to significantly improve operations around application, assessment, calculation, and communication for California property tax exemptions and Proposition 19 claims. Our vision is to foster greater collaboration between stakeholders, enhance transparency in the process, and provide a user-friendly platform that empowers claimants to manage their exemptions and claims effectively.

A successful implementation of the Solution will help optimize operational efficiency, reduce processing times, and ensure compliance with all regulatory requirements. By driving value for Assessors' offices, claimants, and government agencies alike, the Proposition 19 & Exemptions System will create a modern, agile solution that addresses current pain points and sets the standard for future exemption management processes.

Intent of this RFP

The purpose of this RFP is to identify and select a vendor proposal that combines a Proposition 19 & Exemptions System and professional services into an overall Solution that is comprised of two closely related but distinct components:

1. The first component is aimed at creating a portal to file required forms by taxpayers and a way for counties to collaborate on data collection and communication pursuant to Proposition 19.
2. The second component will create a public portal for schools, churches, affordable housing providers, non-profits, museums, etc. (any potential claimants), to file their property tax exemption claim forms electronically with all participating assessor offices. This will allow a more efficient means of communicating and working with property owners, organizations, and other California assessors' offices.

The Solution will support integrations and coordination of the California Board of Equalization (BOE) multiple claims processes, provide capabilities to support required state reporting, cross-county reports, required reports for external parties such as the BOE and the CA Department of Tax and Fee Administration, and for county operational monitoring.

Software, Infrastructure, Implementation Services, and Maintenance and Operations Support Sought

The Authority seeks qualified proposals to provide the following products and services:

1. Software
2. Infrastructure
3. Implementation Services
    a. Project Initiation and Planning
    b. System Design
    c. System Development / Configuration
    d. System Testing
    e. User Training
    f. Deployment
    g. Implementation Closeout
4. Ongoing Maintenance and Operations
5. County Onboarding Services
    a. County Consultation
    b. Assessment System Integration (as elected by individual Counties)
    c. County Configuration
    d. Orientation and Training

Section 1.6 outlines the total project scope and the services required during this engagement.

Potential System Solutions and Hosting Model

The Authority is seeking a vendor that will develop and configure a software product to be hosted in the cloud and provided to counties under a per user subscription model (SaaS).

The Authority is willing to consider a number of system solution types in response to this request. Proposed Solutions may include, but are not limited to, any of the following components:

1. Commercially available Software Product
2. Commercially available Software Product + Custom Development
3. Modular Tools + Custom Development
4. Custom Developed Software
5. Low-Code Application Platform (LCAP)
6. Open-Source Systems
7. Integrated Software Solutions

The System will conform to all appropriate state and federal Americans with Disabilities Act (ADA) and accessibility standards, and the design will utilize responsive User Interface (UI) rendering in various form factors, such as desktop, tablet, and mobile browsers.

County Use Models

Each county will choose their level of use of the Solution and may choose to participate at any point after the implementation is complete. At the time of publishing of this RFP, 32 counties have signed on to the JPA and represent a likely initial set of solution users. All 58 counties have the option to adopt the solution and should be considered as the full potential user base for the proposed solution.

Counties utilizing the Solution will most likely choose one of the following use profiles:

1. Use of Solution for Claimant Forms submission and Cross-County Communication.
2. Use of Solution for Claimant Forms submission and Claims processing (No integration between Solution and County Assessment System).
3. Use of Solution for Claimant Forms submission and Claims processing (One-way Integration between Solution and County Assessment System).
4. Use of Solution for Claimant Forms submission and Claims processing (Bi-Directional Integration between Solution and County Assessment System).

The Authority requests that vendors respond with a cost model for use of the Solution that is designed in a way that is fair for each county, based on their respective use profile, number of users, and level of integration required.

Schedule*

Release of RFP	April 28, 2025
Last Day to Submit Questions (4:00 PM PT)	May 16, 2025
Letter of Intent to Bid Due	May 23, 2025
Answers to Questions Distributed	May 30, 2025
RFP Response Submission Due Date (4:00 pm PT)	June 27, 2025
Demonstrations, Presentations and Interviews*	July 21 – August 1, 2025
Proposed Award Date*	August 29, 2025

*All dates after the RFP Response Submission Due Date are approximate and may be adjusted as conditions indicate without an addendum to this RFP

Process

A formal Letter of Intent to Bid is due BEFORE the Proposal due date.

The timely submission of a letter of intent to bid is a mandatory prerequisite to the submission of a Proposal. The letter of intent must state the Proposers intent to submit a bid and must identify the Proposer's name and include all the names of partners and subcontractors if intending to bid as a team.

Proposals and all related materials must be received by 4:00 pm PT on Friday, June 27, 2025. Proposals may be submitted to the following link/email: info@ccaitjpa.org. *Please Note: Late submissions will not be considered, nor will physically delivered solutions.*

The proposals will be evaluated by a Selection Committee comprised of parties with experience in the respective evaluation categories.

The evaluation will be conducted in two stages for Proposers that demonstrate they meet the Initial Screening and Minimum Qualification requirements in Sections 3.2.

> Stage 1 – Proposer Experience and Written Proposal Evaluation will evaluate responses to Templates B – I. The highest scoring Proposers in Stage 1 will be invited to Stage 2.
>
> Stage 2 - Demonstration and Presentation Selection Process will evaluate Proposer software demonstrations, presentations, and selection interviews. Scores from Stage 1 of the evaluation will be updated in Stage 2.

The Selection Committee will recommend a Proposer to the Board, who will determine the selected Proposer with whom Authority staff shall commence contract negotiations.

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1 Introduction

1.1 Purpose

The purpose of this Request For Proposal (hereafter referred to as “solicitation” or “RFP”) is to obtain proposals from qualified Proposers to provide the California County Assessors’ Information Technology Authority (Authority) with a public-facing online portal for property owners to submit forms and an information sharing platform for California Assessors to transfer property information, referred to as a Statewide Solution for a Proposition 19 & Exemptions System (Solution).

1.2 Background

In November of 2020, California voters passed Proposition 19 (Prop 19), which dramatically changed property tax laws and placed new administrative and valuation requirements on all Assessors’ offices throughout the State. These requirements mandate the cooperation of County Assessors throughout the State to certify and share property value information statewide.

In 2022, the California State Legislature passed, and the Governor signed into law, Senate Bill 189, which established, from July 1, 2022, to June 30, 2025, inclusive, the County Assessors’ Grant Program to assist county Assessors in performing property assessments with technology investments.

The bill authorized a county Assessor joint powers authority to apply, in the form and manner specified by the Department of Finance (DOF), by October 1, 2022, for program funds. The bill set forth requirements and standards for the review and approval of an application or memorandum and method of payment of program funds.

The California County Assessors’ Information Technology Authority (Authority) was created in November of 2022 as Joint Powers Authority (JPA) organized under Government Code section 6500 for the purpose of implementing the 2022 Budget Act appropriation under RTC 95.60 - County Assessors Grant Program: assistance to county assessors with technology investments. Property owners, as well as the Authority and local government benefit when county assessors can fairly, accurately and expeditiously assess property for property tax purposes. The legislature has determined that providing county assessors with the resources to acquire technology allows for a streamlined process in performing property assessment benefiting constituents statewide.

The budget of the Authority of California included preliminary funding to be disbursed to, managed, and expended by a joint power's agreement comprised of California counties represented by their respective assessor. The funds are for technology system creation and improvements of statewide applications for California assessor offices. The Authority is managed by a board of directors consisting of the California Assessor Association (CAA) President, the CAA Treasurer, a coordinating assessor, and an additional 6 assessors chosen by the member assessors of the Joint Powers Authority.

DOF requires that the new program be available to all 58 counties and taxpayers, and participants formed a JPA to administer and implement. At the time of publishing of this RFP, 32 counties have signed on to the JPA and represent a likely initial set of solution users. All 58 counties have the option to adopt the solution and should be considered as the full potential user base for the proposed solution.

1.3 Current State

While each jurisdiction operates under its own set of policies, regulations, and statutes, the vast majority of the responsibilities and procedures of each County Assessor’s office are consistently dictated by California Revenue and Taxation Code. The California State Board of Equalization (BOE) defines and acts in an oversight capacity to ensure compliance by county Assessors with property tax laws, regulations, and assessment issues.

County Assessment Systems in California are managed at the County level. The needs of each County vary widely based on geographical size, population, and property profiles. Similarly, the technical solutions in use, level of maturity of each County's Assessment System and associated solutions, and technical capacity also varies widely by County.

There are, however, fairly consistent gaps in County-level system functionality addressing functional needs for managing property tax exemptions and proposition 19 value transfers. There are also no statewide California solutions to facilitate cross-county coordination and collaboration for property tax management scenarios that cross County boundaries.

Exemptions

Current property tax exemption management systems in California are hindered by a number of significant challenges, resulting in inefficiencies that affect both claimants and Assessor staff. Prolonged claim processing times - often ranging from 12 to 18 months - that frustrate stakeholders and impede the timely resolution of exemption requests.

A major contributor to these issues is the reliance on outdated tools, such as Excel and Access, which were not designed with Assessor-specific business outcomes in mind. This lack of a streamlined, purpose-built system leads to inefficiencies, manual data entry errors, and bottlenecks.

Moreover, both claimants and Assessors' offices struggle with cumbersome, manual processes that lack automation, clear communication, and real-time tracking. This not only prolongs the processing of claims but also contributes to missed deadlines, inconsistent information sharing, and an overall lack of transparency.

For example, there is also a highly manual process between County Assessor staff and the BOE (Board of Equalization) to resolve situations in which a claimant has multiple active Claims for Homeowners' and/or Disabled Veterans' Exemptions. There are also no effective tools for preventing this situation from continuing to occur in the future.

These issues underscore the need for a modernized, technology-driven solution to improve efficiency, reduce backlogs, and enhance the experience for all stakeholders involved in the property tax exemption process.

Proposition 19

Proposition 19 value transfers are extremely complex and County Assessment Systems often do not have specialized capabilities or workflows to effectively manage this work. This necessitates the use of external tools such as Excel to track and manage the work, complicating the process, significantly slowing the processing timeline, and introducing data quality risk.

There is also very limited visibility and a highly manual process between Counties to obtain the necessary information to process claims in the cases when Base Year Value Transfer Claims cross County lines.

These issues underscore the need for a modernized, technology-driven solution to improve efficiency, increase collaboration, and enhance the experience for all stakeholders involved in the Proposition 19 value transfer process.

1.4 Project Goals

Through a public-facing online portal for property owners to submit forms and an information sharing platform for California Assessors to transfer property information -a Statewide Proposition 19 & Exemptions System, the Authority seeks to significantly improve operations around application, assessment, and communication for California property tax exemptions and Proposition 19 claims. Our

vision is to foster greater collaboration between stakeholders, enhance transparency in the process, and provide a user-friendly platform that empowers claimants to manage their exemptions and claims effectively.

A successful implementation of the Solution will help optimize operational efficiency, reduce processing times, and ensure compliance with all regulatory requirements. By driving value for Assessors' offices, claimants, and government agencies alike, the Proposition 19 & Exemptions System will create a modern, agile solution that addresses the current pain points and sets the standard for future exemption management processes.

We are inviting qualified vendors to submit proposals for a Proposition 19 & Exemptions Solution that will implement an innovative and scalable cloud-based Software-as-a-Service (SaaS) system that supports cross-county data sharing, automated alerts, and reporting functionalities. The Solution aligns with the requirements outlined in California's Proposition 19 regulations, focusing on property assessment transfers and efficient inheritance rule management. The CCAITA Board, with recommendation from the Prop 19 & Exemptions Advisory Committee, will approve a Statement of Work and vendor contract to provide a Proposition 19 & Exemptions System accessible by all participating California Assessor Counties.

Table 1. Project Goals and Objectives: High Level Project Requirements

Project Objective	Projected Benefit
Automate and streamline the Prop 19 certification process between California Counties by providing a centralized Prop 19 Portal Case Management solution that allows Assessor staff to request and send information between Counties for Prop 19 applications filed by property owners.	Expedite Prop 19 processing by improving county-to-county communication and data exchange.
Ensure the case management workflows can be scaled out to include increased functionality such as automated data exchange, online forms, and API exposure to existing Counties' Assessment Systems.	Streamline the Prop 19 and Exemptions process for both claimants and Assessor's office staff.
Automate and streamline the Exemptions management process by providing a solution that allows Assessor staff to request and send information related to claims filed by local entities.	Expedite Exemptions processing by improving communications between the Assessor's office and claimants.
Maintain and publish an audit trail of data exchanges, results and processing times. Generate analytical dashboard and reports.	Quantify Exemptions claims, report on positive or negative gain for the county, and audit county response times.
Maintain and publish an audit trail of data exchanges, results, and processing time between counties. Generate analytical dashboard and reports including compliance with the CDTFA Proposition Filing requirements.	Quantify cross-county Prop 19 claims, report on positive or negative gain for the county, and audit county response times.
Offer varying levels of ability for each County to opt-in to utilizing the Solution based on their individual needs.	Maximum County adoption and cross-county value of the solution.
Support Exemptions and Prop 19 reporting and reporting processes.	Improved efficiency and quality of reporting.

1.5 Statement of Need

The purpose of this RFP is to identify and select a vendor proposal that combines a Proposition 19 & Exemptions System and professional services into an overall Solution that is comprised of two closely related but distinct components:

1. The first component is aimed at creating a portal to file required forms by taxpayers and a way for counties to collaborate on data collection and communication pursuant to Proposition 19.
2. The second component will create a public portal for schools, churches, affordable housing providers, non-profits, museums, etc. (any potential claimants), to file their property tax exemption claim forms electronically with all participating assessor offices. This will allow a more efficient means of communicating and working with property owners, organizations, and other California assessors' offices.

1.6 Software, Infrastructure, Implementation Services, and Maintenance and Operations Support Sought

The Authority seeks qualified proposals to provide the following products and services:

1. Software
2. Infrastructure
3. Implementation Services
    a. Project Initiation and Planning
    b. System Design
    c. System Development / Configuration
    d. System Testing
    e. User Training
    f. Deployment
    g. Implementation Closeout
4. Ongoing Maintenance and Operations
5. County Onboarding Services
    a. County Consultation
    b. Assessment System Integration (as elected by individual Counties)
    c. County Configuration
    d. Orientation and Training

These services will be provided through a deliverable based contract as negotiated between the Authority and selected Proposer. The detailed statement of work and associated deliverables are outlined in *Section 2.2 – Statement of Work*.

2 Scope of Work

2.1 Scope

This scope of work is not intended to be all inclusive of the work the Authority expects to be performed and is not a complete listing of all services that may be required or desired.

The Authority will negotiate the specific scope of services, budget, deliverables, and timeline with the Proposer selected for contract negotiations. There is no guarantee of a minimum amount of work or compensation for any Proposer(s) selected for contract negotiations.

2.1.1 Potential System Solutions and Hosting Service Delivery Model

The Authority is seeking a Vendor that will develop and configure a software product to be hosted in the cloud and provided to a County under a per user subscription model – this model is commonly referred to as **Software-as-a-Service (SaaS) delivery model**. Data associated with the proposed solution must be housed onshore (in US).

The Authority is willing to consider a number of system solution types in response to this request. Proposed Solutions may include, but are not limited to, any of the following components:

1. **Commercially available Software Product** – A cloud-native, hosted application provided on a defined service basis that only requires configuration to meet the Authority's business needs. (Having been commercially available and in a production environment for a minimum of 2 years)
2. **Commercially available Software Product + Custom Development** – A cloud-native, hosted application provided on a defined service basis that requires both configuration and custom code development to fully meet the Authority's business needs.
3. **Modular Tools + Custom Development** – Multiple cloud-native, hosted applications provided on defined service bases that require both configuration and some custom code development to be combined to form a whole System that meets the Authority's business needs. (The Proposer should consider the best options available in identifying any modular tools proposed. The Authority is willing to consider a best-of-breed approach.)
4. **Custom Developed System** – Custom developed software to meet the Authority's business needs.
5. **Low-Code Application Platform (LCAP)** – Deployment and customization of select LCAP solutions to meet the Authority's business needs.
6. **Open Source Systems** – Deployment and customization of an Open Source solution.
7. **Integrated Software Solutions** – A single or integrated set of solutions that deliver the functional and technical requirements described in the RFP.

2.1.2 Functional Scope

At a high level, the System must enable the following business capabilities:

- **Web Portal:** Streamline Claimant experiences through a digital portal to facilitate accurate form selection, completion and submission and reduce follow up and re-work by counties.
- **Claims Management:** Support the tracking and processing of multiple types of exemption and proposition 19 value transfer claims.
- **Field Investigation:** Support the management and completion of field investigations in support of multiple claims types.
- **Communication and Data:** Provide a digital information sharing platform to facilitate cross county communication and Data Management.
- **Reporting:** Provide capabilities to facilitate and simplify required state reporting, cross-county reports, required reports for external parties such as the BOE (Board of Equalization) and CDTFA (California Department of Tax and Fee Administration), and for County operational monitoring of work completed and work in progress.
- **Templates/Correspondence:** Storing and appropriate application of templates and contact information to facilitate digital and physical correspondence
- **Calculations:** Configurable predefined calculations for generating and validating key values

- **User Authentication:** Ability to automate authentication of and external user accounts

The system must also be flexible and extensible to meet future functional scope.

2.1.2.1 Supported Business Processes

CCAITA has developed future-state Business Process flows that describe how the Counties would like to operate once the Solution has been implemented. Business Processes were developed through a collaborative process with representatives from small, medium, and large California Counties. These high-level Business Process flows describe the major steps within a given process and identify the handoffs and areas of transition and variability within processes.

The desired system will enable the following Business Processes:

- File and process Homeowners' Exemption Claim
- File and process Disabled Veterans' Exemption Claim
- File and process Institutional Exemption Claim
- Cancel Exemption
- Complete BOE Multiple Claims Process
- File and process Base Year Value Transfer Claim
- Sale of Base Year Value Transfer Property
- File and process Intergenerational Transfer Claim

These Business Processes provide context for the requirements and enabling of these Business Processes is included in the Scope of Work.

The future-state Business Process Maps can be found in *Attachment 5 – Assessor Process Flows*.

2.1.2.2 Supported Use Cases

The CCAITA has developed future-state Use Cases that describe how Users would like to interact with their new Solution, once implemented. Use Cases were developed through a collaborative process with representatives from small, medium, and large California Counties. These Use Cases describe the actors involved, how they will interact with the system during a given scenario, and how the system will respond to their actions.

The desired system will enable the following Use Cases:

- File and Process Homeowners' Exemption Claim
- File and Process Disabled Veterans' Exemption Claim
- File and Process Institutional Exemption Claim
- Cancel Exemption
- Complete BOE Multiple Claims Process
- File and Process Base Year Value Transfer Claim
- Sale of Base Year Value Transfer Property
- File and Process Intergenerational Transfer Claim

The future-state Use Cases provide context for the requirements and enabling of these Use Cases is included in the Scope of Work.

The future-state Use Cases can be found in *Attachment 6 – Assessor Use Cases*.

2.1.3 Technical Capabilities

At a high level, the Proposition 19 & Exemptions System must satisfy the following technical capabilities:

- **Web Portal User Interface:** The system should allow applicants to submit required documentation electronically and manage these documents securely.
- **Identity and Access Management (internal and external users):** The system should provide robust user authentication mechanisms, ensuring that only authorized individuals can access (password expiration updates).
- **Form Management:** The system should be able to manage applicant documents securely. The system should ensure mandatory required fields are accurate (format) and complete (number of attachments) entered.
- **Address Verification:** The system needs technical capability for address verification for Claims and other documents requiring addresses.
- **Document Uploads:** Users should be able to upload documents within the platform.
- **Electronic Signature Platform:** The system should provide support for multiple signatories, allowing sequential or parallel signing workflows where multiple individuals need to sign the same document.
- **Workflow Management (screens and human tasks):** The system should allow a seamless progression of tasks and workflows through enhanced user experiences. Support for human-centric tasks, including manual data entry, approvals, reviews, and decision-making processes that require human intervention or judgment is essential.
- **Secure Data Repository:** The system should securely collect and store essential information, including sensitive data (SSNs, DVET Status, etc.).
- **Enterprise Integration Platform:** The system should be able to integrate with other systems or databases, such as County Assessment Systems through APIs.
- **Automated Instant Messages / Emails:** The system should deploy automated systems to communicate with system users through messaging platforms.
- **Reporting and Dashboarding:** The system should provide an analytical platform with predefined and ad hoc real-time reporting capabilities as well as dashboarding capabilities.

2.1.4 County Use Model and Associated County Onboarding Services

2.1.4.1 County Use Model

Each county will choose their level of use of the Solution and may opt in to participation at any point after the implementation is complete. At the time of publishing of this RFP, 32 counties have signed on to the JPA and represent a likely initial set of solution users. All 58 counties have the option to adopt the solution and should be considered as the full potential user base for the proposed solution.

Counties utilizing the Solution will most likely choose one of the following use profiles:

Use Profile 1. Use of Solution for Claimant Forms submission and Cross-County Communication.

a. Claimants submit Claims Forms and supplemental information through the Solution Web Portal.

b. Claims submitted directly to the County do not interact with the Solution.

c. County Staff extract Claims information from the Solution and process using County systems.

d. County Staff may use the Solution to communicate with other Counties, including the requesting of Certifications.

e. The Solution contains very limited County data and is unlikely to be useful for wholistic

reporting and analytics.

Use Profile 2. Use of Solution for Claimant Forms submission and Claims processing (No integration between Solution and County Assessment System).

a. Claimants submit Claims Forms and supplemental information through the Solution Web Portal.

b. Claims submitted directly to the County are uploaded to the Solution.

c. County Staff process the Claims through the Solution and/or through the local County Assessment System.

d. Information from County Assessment System necessary for processing Claims is viewed from the Assessment System.

e. Claims findings/results are manually input into County Assessment System.

f. County Staff may use the Solution to communicate with other Counties, including the requesting of Certifications.

g. County may use the Solution's reporting and analytics capabilities for reporting on County data within the Solution.

Use Profile 3. Use of Solution for Claimant Forms submission and Claims processing (One-way Integration between Solution and County Assessment System).

a. Claimants submit Claims Forms and supplemental information through the Solution Web Portal.

b. Claims submitted directly to the County are uploaded to the Solution.

c. County Staff process the Claims through the Solution and/or through the local County Assessment System.

d. Information from County Assessment System necessary for processing Claims is viewable directly within the Solution.

e. Claims findings/results are manually input into County Assessment System.

f. County Staff may use the Solution to communicate with other Counties, including the requesting of Certifications.

g. County may use the Solution's reporting and analytics capabilities for reporting on County data within the Solution.

Use Profile 4. Use of Solution for Claimant Forms submission and Claims processing (Bi-Directional Integration between Solution and County Assessment System).

a. Claimants submit Claims Forms and supplemental information through the Solution Web Portal.

b. Claims submitted directly to the County are uploaded to the Solution.

c. County Staff process the Claims through the Solution and/or through the local County Assessment System.

d. Information from County Assessment System necessary for processing Claims is viewable directly within the Solution.

e. Claims findings/results are communicated to both the County Assessment System and the Authority Solution through an automated, bi-directional interface.

f. County Staff may use the Solution to communicate with other Counties, including the requesting of Certifications.

g. County may use the Solution's reporting and analytics capabilities for reporting on County

data within the Solution.

2.1.4.2 County Onboarding Services

The Proposer is expected to provide Onboarding services to each County that considers adopting the Solution. These services are expected to include:

1. **County Consultation:** Providing an initial orientation to the Solution and outlining the County's use options. Facilitating conversations with the County around the implications of the chosen use option including, but not limited to any timing, cost, and required activities associated with integrating the County's Assessment System.
2. **County Assessment System Integration (as elected by individual Counties):** Working with the County and the County's Assessment System Administrator (may be a third-party vendor, a County-developed product, etc.) to prepare the Assessment System and relevant data for integration with the Solution.
3. **County Configuration:** Configuring the Solution to meet any County-specific requirements
4. **Orientation and Training:** Orienting of County Staff to licensing and support processes for the Solution and Training of County staff on use of the Solution

Project Management responsibilities associated with planning for and completing County Onboarding Services is also included in the Scope of Work.

2.1.5 Licensing Models

The Authority requires a Licensing Model that accommodates anticipated Solution Users:

- **Internal Users** – County Assessor's Staff spanning a variety of roles and utilizing the System according to the above-described County Use Profiles
- **Authenticated External Users** – Property Owners or designees who predominately interact with the Web Portal

Each County that utilizes the Solution will require both Internal Users and Authenticated External Users. Details about how Internal and External Users are expected to interact with the Solution can be found in *Attachment 6 – Assessor Use Cases*.

Proposers should define and describe the proposed Licensing Model including: license types and license tiers necessary for Internal and External users to interact effectively with the proposed solution. The number of each license type required by an individual County will be determined during the County Consultation portion of the County onboarding process.

2.1.6 Support Models

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. Support for more complex issues will be exclusively the responsibility of the Proposer.

2.1.7 Other Procurement Considerations including Fixed Bid Price

The Authority will only accept fixed bid proposals for the software, professional services, and ongoing maintenance and operations. Payment from the effective date through the end of the warranty period will be deliverables-based.

During implementation, payment milestones should be primarily based on the delivery of working functionality as demonstrated through successful user testing and implementation. Payments will be

determined based on predetermined groups of functionalities and upon any final agreement with Authority regarding development and/or deployment schedules.

The Authority desires access to all source code, configurations, software, data, environments, and configuration tools that are used to support the system. The Authority requires the ability to transition these to a different system integrator upon an agreed to set of qualifying events or circumstances.

The Authority prefers a phased approach to building and testing new functionality prior to the completion of the entire Solution.

Proposers must be prepared to commence Task 1 within 30 days from the signature of final contract and go-live within a negotiated timeframe after which liquidated damages may apply.

2.2 Statement of Work

A suggested statement of work (SOW) is outlined below. This attachment outlines the tasks, subtasks, and activities that the Authority expects the Proposer to complete for this Project.

2.2.1 Overview of Tasks

The Authority has organized its statement of work into seven (7) major implementation tasks. A summary of each task is provided below.

Task 1 - Project Initiation and Planning: The Authority's expectations regarding the project kick-off and management.

Task 2 – System, Interface and Data Conversion Design: The Authority's expectations regarding the developing and detailing of the plans for designing the System to meet the needs of the Authority. This includes the design of the interfaces with potentially 58 County Assessment Systems for sending and receiving information and performing the associated data conversion from those systems.

Task 3 - System Development / Configuration: The Authority's expectations regarding the development and/or configuration of the System to meet the Authority's needs through execution of the designs created in Task 2. This includes the development of "Solution-side" interface capabilities that may potentially support 58 County Assessment Systems of Record and associated data conversion from those systems (if chosen by each/any individual participating county).

Task 4 – System Testing: The Authority's expectations regarding the testing of the System and interfaces developed/configured in Task 3 to ensure that it meets the needs of the Authority.

Task 5 – User Training: The Authority's expectations regarding the training of assessor staff in using the new System. Training plans must be adapted and tailored to different license types and functionality that counties may opt for.

Task 6 – Deployment: The Authority's expectations regarding the deploying of the new System into production. This includes the development and deployment of "County-side" interfaces chosen by each/any individual participating counties at the time of original Solution deployment, as well as any additional training for individual county staff supporting deployed interfaces.

Task 7 – Implementation Closeout: The Authority's expectations regarding the process of concluding implementation.

2.2.2 Implementation Deliverables

The preliminary deliverables and activities associated with each task are as follows:

Implementation Phase		
Tasks	**Deliverables**	**Activities**
Task 1 - Project Initiation and Planning	Deliverable 1 - Project Initiation and Management Plan	• Project Initiation • Project Initiation Planning • Project Kick Off Presentation • Project Management Plan • Project Scope • Costs/Budget • Risk Analysis and Management Plan • Quality Management Plan • Project Procurement Plan • Team Membership • Project Work Plan and Schedule • Change Management Plan • Communication Plan • Change Request • Closure
	Deliverable 2 – Regular Project Status Reporting	• Minimum of Bi-Weekly Status Report
	Deliverable 3 – System Design and Development Strategy	• System Design Methodology • System Design and Development Strategy
	Deliverable 4 – System Implementation Strategy	• System Implementation Strategy
	Deliverable 5 – Master Testing Strategy	• Master Testing Strategy
	Deliverable 6 – Requirements Traceability Plan	• Requirements Traceability Matrix
Task 2 – System, Interface and Data Conversion Design	Deliverable 7 – Functional Design Document	• Functional Design Document
	Deliverable 8 – Data Interoperability Plan	• Develop Data Conversion and Interoperability Plan
	Deliverable 9 – Interface Specifications and Design Document	• Develop Interface Specifications and Design Document
	Deliverable 10 – System Architecture and Technical Design	• System Architecture • Technical Design Document
Task 3 - System Development / Configuration	Deliverable 11 – System Implementation Plan	• System Development Methodology • Software Configuration Management • Change and Release Management
	Deliverable 12 – Data Conversion, Synchronization, and Reporting	• Staging Tables • Data Load • Testing Conversion
	Deliverable 13 – System Maintenance, Support and Transition Plan	• System Maintenance, Support and Transition Plan

Implementation Phase		
Tasks	**Deliverables**	**Activities**
Task 4 – System Testing	Deliverable 14 – Detailed Test Plans	• Unit and Integration Testing • System Testing • User Acceptance Testing • Performance Testing • System Regression Testing • Testing Plan
	Deliverable 15 – Test Scenarios, Test Cases, and Test Scripts	• Test Scenarios, Test Cases, and Test Scripts
	Deliverable 16 – Documented System Test Results	• Documented System Test Results
Task 5 – User Training	Deliverable 17 – Training Plan	• End User Training from a “Train the Trainer” Model • Security Administrator Training • Administrative and Management Staff Training • Configuration Training • Reporting and Analytical Tools training
	Deliverable 18 – Training Manuals, Guides, and Materials	• Training Manuals, Guides, and Materials
	Deliverable 19 – Documented Evidence of Successful End-User Training	• Documented Evidence of Successful End-User Training
Task 6 - Deployment	Deliverable 20 – Release Readiness Evaluations and Reports	• Release Readiness Evaluation and Report
	Deliverable 21 – Deployment Plans	• Deployment Bill of Materials (for each implementation Phase) • Deployment Plan • System Deployment • Production Support • Production Support Plan Help Desk Levels • System Incident and Corrective Action Reports
	Deliverable 22 – System Defect Resolution Reports	• System Incident • Defect Resolution Reports
	Deliverable 23 – Complete Detailed Requirements, Design & Specifications	• Complete Detailed Requirements, Design & Specifications
	Deliverable 24 – System Source Code and Documentation	• System Source Code Escrow Information • System Documentation • Final Acceptance
Task 7 – Implementation Closeout	Deliverable 25 – Documented Implementation Project Closeout	• Documented Implementation Project Closeout

2.2.3 Maintenance & Operations Deliverables

A suggested set of Maintenance and Operations tasks, deliverables, and activities are included below, which the Authority expects the Proposer to include and/or meet as part of a maintenance and operations agreement.

Any selected Proposer from this RFP process is expected to refine their proposed services through ongoing discussion and negotiations toward the creation of a binding agreement and contract with the Authority. Final SOW specifics will be established directly pertaining to the product and service offering(s) proposed at the time of final contract agreement. Until that refinement and eventual selection, SOW activities and deliverables related to Maintenance and Operations that are indicated in this RFP document shall provide broad inclusion of all potential System products, Solution delivery models, and professional services.

Maintenance and Operations		
Tasks	**Deliverables**	**Activities**
Ongoing Maintenance and Operations	System Incident Reports – M&O Support	• Software Maintenance and Operations (M&O) Support • Software M&O Support Requests and Resolution • Software as a Service • Corrective Maintenance – System Incident Resolution
	Adaptive Maintenance Reports – M&O Support	• Adaptive Maintenance Reports
	System Enhancements Reports – M&O Support	• System Enhancements

2.3 Quality Assurance Vendor Support

Quality Assurance (QA) Validation is the process of examining the complete program/Project to determine whether all stakeholders' requirements have been met. It uses iterative processes throughout the overall Project and SDLC to determine whether the plans, methods, and products delivered are internally complete, consistent, and sufficiently correct.

QA is performed by an organization that is technically, managerially, and financially independent of the Proposer organization. The Authority understands the importance and strongly endorses the use of QA to ensure a successful System implementation. The Authority may contract for QA services to support the success of the System implementation. By providing a response to this RFP, the Proposer acknowledges their willingness to work collaboratively with any QA service provider under contract with the Authority.

3 Evaluation and Selection Criteria

This section describes the process used for analyzing and evaluating the Proposals. It is the Authority's intent to select Proposer(s) for contract negotiations that will provide the best overall solution to the Authority, inclusive of cost considerations. Any Proposer selected for contract negotiations is not guaranteed a contract. This RFP does not in any way limit the Authority's right to solicit Proposals for similar or identical services if, in the Authority's sole and absolute discretion, it determines the Proposals are inadequate to satisfy its requirements.

3.1 Initial Screening

Authority staff will review each Proposal for initial determinations on responsiveness and acceptability in an Initial Screening process. Elements reviewed during the Initial Screening include, without limitation: Proposal completeness, compliance with format requirements, compliance with minimum qualification requirements, and verifiable references.

Proposals will not be scored during the Initial Screening process. Initial Screening is simply a pass/fail determination as to whether a Proposal meets the threshold requirements described above. A Proposal that fails to meet these requirements will not be eligible for consideration in the evaluation process described in the sections below. The Authority reserves the right to request clarification from Proposers prior to rejecting a Proposal for failure to meet the Initial Screening requirements. Clarifications are limited exchanges between the Authority and a Proposer for the purpose of clarifying certain aspects of the Proposal and will not provide a Proposer the opportunity to revise or modify its Proposal. Proposals that meet the Initial Screening requirements shall proceed to the evaluation process.

3.2 Minimum Qualifications

Proposers must meet the following Minimum Qualifications in order to be evaluated in the staged evaluation process described in Section 3.3. Authority staff will evaluate the Minimum Qualifications. Any Proposal that does not demonstrate the Proposer meets the Minimum Qualifications listed in this section at the time of Proposal submission will be considered non-responsive and will not be evaluated or eligible for award of any subsequent contract(s) for the requested System or services. The Proposer should provide their response according to *Template A – Minimum Mandatory Requirements*.

Organization and Stability

1. The Proposer has been in business continuously for at least five (5) years, and during this period provided software products and services similar to those requested in this RFP.
2. In their official response, the Proposer has provided audited financial statements and an accompanying narrative demonstrating the ongoing stability of their organization and operations.

Professional Services and Software Experience

3. The Proposer shall submit three (3) U.S. based references similar in size, complexity, and scope. All reference must be within the last five (5) years.
    a. At least one (1) reference must be from a California government organization
    b. At least one (1) reference must verify the Proposer has implemented the Proposer's software products into a production environment, and the software has been in use for two (2) full fiscal year cycles.

Proposals should clearly demonstrate that the qualifications are met. Insufficient or incomplete information may result in a proposal being considered non-responsive and may not be eligible for award of the contract. If required information is complete, but Authority determines that the Proposer does not meet Minimum Qualifications, the Proposer may be deemed non-responsive.

3.3 Preferred Qualifications

Proposers that have Professional Services and Software Experience related to property assessment are preferred. 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. At least one functional module must be in a production environment. The reference must be a U.S. based reference similar in size, complexity, and scope. All reference must be within the last five (5) years.

3.4 Evaluation

The proposals will be evaluated by a Selection Committee comprised of parties with experience in property assessment and/or software implementation and maintenance. The Authority intends to evaluate the proposals generally in accordance with the criteria itemized below.

The evaluation will be conducted in two stages for Proposers that demonstrate they meet the Initial Screening and Minimum Qualification requirements in *Sections 3.2*.

> **Stage 1 – Proposer Experience and Written Proposal Evaluation** will evaluate responses to Templates B – I. The highest scoring Proposers in Stage 1 will be invited to Stage 2.
>
> **Stage 2 – Demonstration and Presentation Selection Process** will evaluate Proposer software demonstrations, presentations, and selection interviews. Scores from Stage 1 of the evaluation will be updated in Stage 2.

The highest scoring Proposer in Stage 2 will be invited to enter contract negotiations with the Authority. If mutually agreed upon contract terms cannot be negotiated with the selected Proposer, then the Authority, in its sole and absolute discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposer.

3.4.1 Selection Committee

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.

3.4.2 Stage 1 – Proposer Experience and Written Proposal Evaluation Criteria

The completion of *Templates B - I* from the Proposers will be evaluated and scored in accordance with the criteria below:

1. **Proposer Company and Staff Experience – 10%**
   The Proposer is required to provide information regarding the company, including basic background and employee resumes, as well as information regarding the key staff and the Project organization being proposed. Sub-criteria include:

   Template B - Proposer Experience

   Template C - Staff Experience

2. **Business Functionality – 25%**
   The Proposer is required to respond to each set of Functional Requirements, and to describe its overall approach. Sub-criteria include:

   Template D – Requirements Matrices: Functional Requirements Tab

   Template E - Functional Approach

3. **Technical Functionality – 15%**
   The Proposer is required to respond to each set of Technical Requirements, and to describe its overall approach. Sub-criteria include:

   Template D – Requirements Matrices: Technical Requirements Tab

   Template F – Technical Approach

4. **Implementation – 15%**
   The Proposer is required to respond to describe their overall implementation approach. Sub-criteria includes:

   Template G – Implementation Approach

5. **Maintenance and Operations – 15%**
   Proposers are required to respond to each set of Maintenance and Operations requirements, and to describe their overall approach. Sub-criteria includes:

   Template D - Requirements Matrices: M&O Requirements

   Template H – Maintenance and Operation Approach

6. **Cost – 20%**
   Complete *Template I - Cost Workbook* by listing the total cost of ownership of the System and implementation services being proposed.

   Template I – Cost Workbook

3.4.3 Stage 2 – Demonstrations, Presentations and Interviews Selection Process

The Proposers receiving the highest scores in Stage 1 will be invited to participate in the Proposer Demonstrations, Presentations and Interviews Selection Process (Stage 2). The Selection Committee will determine the format to be used during Stage 2, and will evaluate each Proposer based on their demonstration, presentation, and interview responses.

Please Note: *As part of the Stage 2 process, Key Proposer Personnel (as named in Template C – Staff Experience Response Template) should be made available to present, as well as lead staff of sub-contracted partner(s).*

Factors that will be considered during the presentations and interviews will include (but shall not be limited to):

1. **Business environment** – ability to define the size and scope of the Project that the Authority is envisioning.
2. **Project plan** – ability to present a detailed Project plan and describe how that plan will fulfill the Project scope.
3. **Business process improvement** – approach to utilizing the proposed Solution to improve business practices, change management approach, and methodology for identifying process improvement opportunities.
4. **Data interoperability** – ability to present a Data Interoperability plan which demonstrates the Proposer's ability to be successful.
5. **Risk mitigation** – approach to identifying risk factors and minimizing the risk to a successful

implementation.

6. **Training plan** – ability to successfully identify and assess training methodologies that best suit county assessor needs.
7. **Technology** – ability to identify and assess technology platforms and architecture.

3.5 Intent to Award and Contract Negotiations; Other Terms and Conditions

The Selection Committee will recommend a Proposer to the Board who will determine the selected Proposer with whom Authority staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the Authority of all terms of the proposal, which may be subject to further negotiations and approvals before the Authority may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time, the Authority, in its sole discretion, may terminate negotiations with the highest ranked Proposer and begin contract negotiations with the next highest ranked Proposer.

The successful proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as *Attachment 3 – Contract Terms & Conditions*. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The Authority, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

The selection of any Proposer for contract negotiations shall not imply acceptance by the Authority of all terms of the Proposal, which may be subject to further negotiation and approvals.

4 Proposer Response Information

This section provides Proposers with the information that must be included in the proposal, as well as additional information to inform the Proposers submission of bids.

4.1 Use of Subcontractor

The Authority will not consider joint or collaborative proposals that require it to contract with more than one Proposer. Any proposal involving more than one organization must have a single Prime Contractor/Proposer who is fully accountable to Authority for the delivery of all products and services, is responsible for adhering to all contractual terms, and will receive all payments by the Authority for said services. If the Proposal includes the use of Subcontractor(s), the Proposer shall provide information regarding the profile of each Subcontractor.

A single Proposer may propose technology products and licenses that may result in multiple contract agreements. The Authority is willing to enter into separate contracts for professional services and software solutions that are bundled into a single proposal.

4.2 Letter of Intent to Bid

A formal Letter of Intent to Bid is due **BEFORE** the Proposal due date. The timely submission of a letter of intent to bid is a mandatory prerequisite to the submission of a Proposal. The letter of intent must state the Proposers intent to submit a bid and must identify the Proposer's name and include all the names of partners and subcontractors if intending to bid as a team.

4.3 Time and Place for Submission of Proposals

Proposals and all related materials must be received by 4:00 pm PT on Friday, June 27, 2025. Proposals may be submitted to the following email: info@ccaitjpa.org

Please Note: *Late submissions will not be considered, nor will physically delivered responses.*

4.4 Key Action Dates

The Authority has an intentionally aggressive timeline due to the desired to deploy a fully functioning system by Q4 2026. Adherence to the following schedule of dates and times is required. If the Authority finds it necessary to change any of these dates, it will be accomplished by issuing an addendum.

RFP Activities	Date
Release of RFP	April 28, 2025
Last Day to Submit Questions (4:00PM PT)	May 16, 2025
Letter of Intent to Bid Due	May 23, 2025
Answers to Questions Distributed	May 30, 2025
RFP Response Submission Due Date (4:00pm PT)	June 27, 2025
Demonstrations, Presentations and Interviews*	July 21 – August 1, 2025*
Proposed Award Date*	August 29, 2025*

* All dates after the RFP Response Submission Due Date are approximate and may be adjusted as conditions indicate without an addendum to this RFP.

4.5 Proposal Package Format and Content

The following items listed in *Section 4.4.1 – Proposal Checklist* must be included in the proposal.

Complete and concise Proposals are recommended for ease of review by the Selection Committee. Proposals should provide a straightforward description of the Proposer's capabilities to satisfy the requirements of the RFP. Responses to individual questions within each response template should not exceed one (1) page in length. Marketing and sales-type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled with references to the appropriate section of the RFP.

Please Note: *Cost information should only appear in Template I – Cost Workbook.*

Proposers must follow the instructions outlined in this section and shall organize their proposal in the order outlined in *Section 4.5.1 – Proposal Checklist*.

4.5.1 Proposal Checklist

Requirement	Description	Submitted
Attachment 1	Cover Letter	☐
Attachment 2	Security and Confidentiality Statement*	☐
Template A	Minimum Mandatory Requirements	☐
Template B	Vendor Experience Response Template	☐
Template C	Staff Experience Response Template	☐
Template D	Requirements Response Matrices	☐
Template E	Functional Approach Response Template	☐
Template F	Technical Approach Response Template	☐
Template G	Implementation Approach Response Template	☐
Template H	Maintenance and Operations Approach Response Template	☐
Template I	Cost Workbook	☐
Informational Attachments		
Attachment 3	Contract Terms & Conditions	
Attachment 4	Budget Detail and Payment Provisions	
Attachment 5	Assessor Process Flows	
Attachment 6	Assessor Use Cases	
Attachment 7	Proposed Maintenance & Operations Service Levels	

*The Security and Confidentiality Statement (Attachment 2) must be signed by an individual authorized to bind the company contractually. Individual Security and Confidentiality Statements are required for each consultant staff before beginning work on this Contract, should a contract award be made.

4.6 Administrative Information

RFP and Response: The RFP and the Respondent's response will be incorporated by reference into the resulting Contract.

Public Records Act (PRA) Requests: Upon award, all documents submitted in response to this RFP will become the property of the Authority and will be regarded as public records under the California PRA (GC § 6250 et. seq.) and subject to review by the public.

Model Contract: Respondent is encouraged to review the designated contractual terms and conditions for an agreement with the Authority in *Attachment 3 – Contract Terms & Conditions*.

Budget Detail & Payment Provisions: Information regarding payment processing provisions and budget details associated is described in *Attachment 4 – Budget Detail and Payment Provisions*.

4.7 References

The Authority may conduct reference checks of the information submitted in *Template A - Minimum Mandatory Requirements* and/or *Template B - Vendor Experience Response Template* in order to confirm the information submitted in a Proposer's proposal.

4.8 Addenda to the RFP

The Authority may make modifications to the RFP by issuing an addendum or addenda.

4.9 Financial Responsibility for Proposal Costs

The Authority accepts no financial responsibility for any costs incurred by a Proposer in responding to this RFP. Submitted Proposals and all Proposal materials shall become the property of the Authority and may be used by the Authority in any way deemed appropriate

5 Project Implementation & Administration

Authority and Contractor shall identify tasks within the scope of this contract, to be agreed upon and approved by Authority and shall be done utilizing workorder authorizations (WA).

All workorder authorizations shall be written to reflect agreed upon tasks, deliverables, and roles/responsibilities, and approved by the Authority Contract Administrator and the Contractor, with a copy sent to the Authority Project Manager, prior to work beginning. The final version of each task/deliverable shall be presented to the Authority Project Managers and Contract Administrator for review and approval or rejection. Work on a task or deliverable shall not begin unless workorder authorization has been obtained from Authority.

5.1 Contractor Reporting Requirements

The Contractor must submit bi-weekly written Project Status Reports in MS Word format to the Authority Project Managers and Contract Administrator, or as otherwise directed. The Project Status Reports shall detail the current status and future activities of this contract. The reports shall include, at minimum, the following information:

1. A summary of the work completed during the reporting period, showing actual versus planned work.
2. The tasks that are behind schedule, the overall impact on the contract, and the approach for remediation.
3. The tasks that are expected to be completed in the next reporting period.
4. Escalations, as appropriate, relating to the Contractor's performance of tasks or any risks and issues.
5. Ad hoc reporting as required.

5.2 Performance

The Authority will be the sole judge of the acceptability of all work performed and all work products produced by the Contractor. Should the work perform, or the products produced by the Contractor fail to meet the Authority conditions, requirements, specifications, guidelines, or other applicable standards, the following resolution process will be employed, except as superseded by other binding processes:

1. The Authority will notify the Contractor in writing within five (5) business days after the Contractor completes each phase of service of any acceptance problems by identifying the specific inadequacies and/or failures in the services performed and/or the products produced by the Contractor. The costs related to rework of unacceptable work products shall not be borne by or billed to the Authority.
2. The Contractor shall, within five (5) business days after initial problem notification, respond to the Authority by submitting a detailed explanation describing precisely how the identified services and/or products adhere to and satisfy all applicable requirements and/or provide a proposed corrective action plan to address the specific inadequacies and/or failures in the identified services and/or products. Failure by the Contractor to respond to the Authority's initial problem notification within the required time limits may result in immediate termination of the Contract. In the event of such termination, the Authority shall pay all amounts due to the Contractor for all work accepted prior to termination commenced.
3. Within five (5) business days after receipt of the Contractor's detailed explanation and/or proposed corrective action plan, the Authority will notify the Contractor in writing whether it accepts or rejects the explanation and/or plan. If the Authority rejects the explanation and/or plan, the Contractor shall submit a revised corrective action plan within three (3) business days of notification of rejection. Failure by the Contractor to respond to the Authority's notification of rejection by submitting a revised corrective action plan within the required time limits may result in

immediate termination of the Contract. In the event of such termination, Authority shall pay all amounts due the Contractor for all work accepted before the termination commenced.

4. The Authority will, within three (3) business days of receipt of the revised corrective action plan, notify the Contractor in writing whether it accepts or rejects the revised corrective action plan proposed by the Contractor. Rejection of the revised corrective action plan will result in immediate termination of the contract. In the event of such termination, the Authority shall pay all amounts due the Contractor for all work accepted before the termination commenced.

5.3 Problem Escalation

The parties acknowledge and agree that certain technical and project-related problems or issues may arise and that such matters shall be brought to Authority's attention. Problems or issues shall normally be reported in regular Contract Status Reports. However, there may be instances where the severity of the problem(s) justifies escalated reporting. To this extent, the Contractor shall determine the severity level and notify the appropriate Authority personnel. The Authority personnel notified, and the time taken to report the problem or issue shall be at a level commensurate with the severity of the problem or issue. The Authority personnel to notify include, but are not limited to, the following:

First level: Authority Project Manager(s) designated for the Proposition 19 & Exemptions System project

Second level: Authority Executive Director

5.4 Cancellation

The Authority may exercise its option to terminate the contract at any time within thirty (30) calendar days' prior written notice. In the event of such termination, the Authority shall pay all amounts due to the Contractor for all work accepted before termination commenced.

5.5 Other Contract Considerations

1. The Contractor shall act as the prime contractor under this contract. In addition to identifying all personnel proposed to work under this contract, the Contractor shall also identify its subcontractor affiliation(s), as applicable.
2. The Authority reserves the right to approve all subcontractors before the subcontractor(s) perform any work.
3. Nothing contained in this contract shall create any conceptual relationship between the Authority and any subcontractors, and no subcontract shall relieve the Contractor of its responsibilities and obligations hereunder. The Contractor is fully responsible to the Authority for the acts and omissions of its subcontractors and persons either directly or indirectly employed by any of them.
4. If a subcontractor is a California Certified Small Business (SB) and/or Disabled Veteran Business Enterprise (DVBE), the Contractor shall identify the amount paid to certified subcontractors on the Contractor's invoice(s).
5. The Contractor's obligation to pay its subcontractors is independent of the Authority's obligation to make payments to the Contractor. As a result, the Authority shall have no obligation to pay or to enforce the payment of any monies to any subcontractor.
6. Military and Veteran Code (MVC) § 999.5(d), 999.7(a) (SB 588), GC § 14841, and California Code of Regulations (CCR) § 1896.78(e) requires all Prime Contractors that had a DVBE firm perform any element of work for a contract to report DVBE information.

Prime Contractors must maintain records supporting the information that they have made all payments to DVBE subcontractor(s). The Prime DVBE Subcontracting form is located at: https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std817.pdf and the instructions are located at:

https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division- Services-List-Folder/File-a-DVBE-Subcontractor-Report

6 Notices of Award and Protest Procedure

Upon the conclusion of negotiations with a Proposer that results in a proposed agreement for the contract solicited in this RFP that are acceptable to Authority as to price and all other terms, Authority shall issue notice of intent to award the contract solicited in this RFP to a Proposer and such notice shall be directed to each entity that submitted a Proposal

Within five business days of Authority's issuance of a notice of intent to award the contract, any Proposer that has submitted a Proposal and believes that Authority has incorrectly selected another Proposer for award may submit a written notice of protest. Such notice of protest must be received by Authority on or before the fifth business day after Authority's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying with specificity each of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the Authority to determine the validity of the protest.

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date Authority received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to: info@ccaitjpa.org

The Authority will respond to the protest within 30 calendar days of receipt of the protest. The determination of the Authority shall be final.

To the furthest extent permitted by law, strict compliance with the procedures and time limits set forth in this section are mandatory and are the Proposers' sole and exclusive remedy in connection with this section's subject matter. A Proposer's failure to comply with these procedures and time limits will constitute a waiver of any right to further pursue a protest, any legal action, or relief that arises out, relates to, or is incident to this RFP.

California County Assessors' Information Technology Authority board

August 8, 2025

CCAITA is pleased to announce that the following entities, in alphabetical order, have been selected to advance to the Oral Review round of the Proposition 19 & Exemptions System (RFP# 01-25):

1. Just Appraised
2. Modern iConcepts
3. Oracle
4. Tyler Technologies

California County Assessors' Information Technology Authority board

Finalists SOW Enhancement Request || RFP #01-25

The Three Proposers Advancing to the Finalists Round:

A. Just Appraised

B. Oracle

C. Tyler Technologies

Finalists SOW Enhancement/Amendment Request :

- **DUE BY 5:00pm PST PST NOV 11 (Tues), 2025**
- Please send responses to Justin Winn (justin.winn@ccaitjpa.org) **&** "Cc" the CCAITA Info address (info@ccaitjpa.org).

Expand w/ examples the following RFP #01-25 Sections, be as exhaustive as possible:

1. Template G (Sections):
    a. 1.1
    b. 1.6
    c. 1.7
    d. 1.15
    e. 1.16
    f. 1.17
2. The First 90-Days:
    a. Proposers' Tasks & Constraints
    b. JPA Tasks & Constraints
    c. County Tasks & Constraints
    d. One Schedule/Timeline of all Tasks

Item 1. Recommendation

Executive Summary

The Ad-Hoc Committee, supported by Justin Winn, Project Manager and Gartner, recommends that the California County Assessors' Information Technology Authority (Authority) issue an Intent to Award to Oracle America, Inc. the contract for the Statewide Proposition 19 & Exemptions System (RFP #01-25). Oracle's proposal provides the strongest overall value through proven production experience in Los Angeles County, a consumption-based Oracle Cloud Infrastructure (OCI) platform, a transparent negotiated 10-year total cost of $17,047,140.79 and a phased, reasonable cost implementation and maintenance approach that directly addresses the Authority's requirements for all 58 counties.

I. Background and Procurement Context

I.I. The Authority issued RFP #01-25 on 04-25-2025 to procure a modern, statewide solution capable of processing Proposition 19 base-year value transfers, intergenerational transfers, and multiple exemption types while supporting cross-county data sharing and long-term operations.

I.II. Three proposals were received and advanced through the staged evaluation process defined in the RFP and Template D (Requirements Response Matrices).

I.III. The Ad-Hoc Committee supported by county subject matter experts conducted a comprehensive review of written submissions, cost workbooks (Template I), clarifications, and supporting documentation, with technical assistance from Gartner.

II. Summary of Oracle's Proposal Strengths

II.I. Relevant California County Experience and Production Reference

II.I.I. Oracle co-developed and implemented a production Prop 19 & Exemptions solution for the Los Angeles County Assessor's Office, the largest and most complex county in the state.

II.I.II. This existing solution provides reusable artifacts (use cases, test cases, FAQs, workflows, and configuration components) that significantly reduce customization risk and accelerate delivery of the Prop 19/Exemption portal for the remaining 57 counties.

II.I.III. Oracle demonstrated deep understanding of California property assessment operations, including Prop 13/58/19 interactions, BOE multiple-claims processes, and county-specific business rules.

II.II. Technical and Functional Approach

II.II.I. The proposed solution is built on Oracle Cloud Infrastructure (OCI) with a modern, secure web portal for claimants and county staff.

II.II.II.The solution includes robust workflow management, document upload with electronic signature support, address verification, automated notifications, real-time dashboards, and configurable calculations aligned with Attachment 5 (Process Flows) and Attachment 6 (Use Cases).

II.II.III. Integration capabilities support 458 planned interfaces (229 low, 160 medium, 69 high complexity) as part of the core development effort rather than as separate line items.

II.III. Implementation and Deployment Methodology

II.III.I. Oracle proposes a phased rollout across all 58 counties, beginning with initial counties in Year 1 and completing onboarding of the remaining counties through structured monthly deployment waves.

II.III.II. The implementation cost workbook (Sheet 3) details 89,708.24 hours across project initiation, design, development (Epic milestones), testing, training, and deployment, for a one-time total of $8,187,772.91.

II.III.III. A DevOps model ensures infrastructure support begins in Year 1, with warranty services provided at no additional charge.

III. Cost Analysis & Value Proposition

III.I.I. Negotiated 10-Year Total: $17,047,140.79.

III.I.II Blended M&O rate: $85 per hour (Years 1–10).

III.II. Pricing Model Advantages

III.II.I. Pure consumption-based OCI model; the Authority pays only for services consumed (with 20% reserve for unplanned changes).

III.II.II. No separate per-user license fees; all environments (Production/DR, Training, Staging, Development, Test) are included.

III.II.III. Reasonable 10% annual usage growth with stable costs assumption beginning Year 3 and 3% inflation for maintenance costs applied only in Years 6–15.

IV. Key Assumptions and Risk Mitigation

IV.I. Oracle's Cost Assumptions (Sheet 7) are transparent and protective of the Authority:

IV.I.I. Integrations are included in development costs (no artificial per-integration pricing).

IV.I.II. No traditional data conversion required; document ingestion approach for existing county records.

IV.I.III. No Tier 0/1 help desk (FAQs provided to existing county IT help desks).

IV.I.IV. 15-year commitment structured as 5-year base + 10 one-year options.

IV.I.V. Re-use of LA County IP reduces customization risk.

IV.II. These assumptions were evaluated against RFP requirements and do not conflict with mandatory terms.

V. Recommendation and Proposed Next Steps

V.I. The Ad-Hoc Committee finds that Oracle's proposal best satisfies the evaluation criteria across Vendor Experience, Functional/Technical Approach, Implementation, Maintenance & Operations, and Cost and recommends the Board adopt the Intent to Award.

V.II. CCAITA Governing Board will authorize Chair to sign contract at the August 2026 Board meeting in Rohnert Park, subject to successful negotiations.

V.III. Board should continue an Ad Hoc Committee to work with PM and Gartner during project implementation.