

# CALIFORNIA COUNTY ASSESSOR'S INFORMATION TECHNOLOGY AUTHORITY

## REQUEST FOR PROPOSALS

With this Request for Proposals ("RFP"), California County Assessor's Information Technology Authority ("Authority") is requesting proposals ("Proposals") from qualified individuals and/or firms ("Respondents") for the following services:

### **Executive Director Services**

The purpose of the Proposal is to demonstrate the qualifications, competence, and capacity of Respondent to perform the work or provide the services described in this RFP.

#### **1. INTRODUCTION**

##### **1.1 About the Authority**

The Authority was created in November 2022 as a joint powers authority organized under Government Code section 6500, et seq. for the purposes of implementing a new information technology program for California County Assessors to assist in the standardization of statewide assessment practices. The program receives state funding as set forth in Revenue and Taxation Code section 95.60. After the implementation of the identified information technology solutions, the Authority may administer and maintain the program going forward.

Authority's office is located at 1221 Oak St Ste 145, Oakland, CA 94612 and its e-mail address for the purpose of this RFP is [Rob.Grossglauser@ccaitjpa.org](mailto:Rob.Grossglauser@ccaitjpa.org). Interested Respondents can obtain information about the Authority at the following website: <https://calassessorsit-jpa.com/> where this RFP will be posted under Procurement.

**1.2 Description of Services** The Authority desires proposals from Respondents who will, as an independent contractor, provide services as the Agency's Executive Director ("Director") consistent with the Scope of Services attached hereto as **Attachment 1** ("Scope"); Certificate of Proposal attached to this RFP as **Attachment 2 (Certificate)** and the Form Professional Services Agreement attached hereto as **Attachment 3** ("Agreement") (collectively, "Services"). The Authority reserves the right, at any time up to selection, augment or revise the Services.

The Authority expects that the Services will include a term of one (1) year, with two (2) additional one (1) year renewal options, exercised at the Authority's sole discretion.

The successful Respondent will be required to enter into an Agreement (**Attachment 3**) which will include the requirements of this RFP as well as other requirements. By submitting a Proposal, the Respondent agrees to all of the terms of the RFP and Agreement. The Authority reserves the right to reject any proposal(s) exceptions or changes to the Agreement or Request for Proposal.

##### **1.3 Minimum Qualifications**

To be eligible to have a Proposal considered, the Respondent must satisfy the following minimum qualifications requirements:

**Experienced Strategist.** Strategic vision and an ability to determine the direction and focus to recommend the CCAITA take in creating the technology system and navigating the options available for contracting with experienced IT vendors. The ideal candidate will help lead the organization through the foundational development of this multi-year effort.

**Excellent Communicator.** Superior interpersonal and communication skills both verbally and in writing. The position requires an individual with confidence, a "people-person" and an ability to articulate items related to property tax assessment, technology, and procurement. The Executive Director will also need to be comfortable presenting to the CCAITA Board and the public. The ideal candidate will be able to competently facilitate meetings, and one who will be effective with both internal and external communication.

**Proven Technology Procurement Experience.** The candidate should have demonstrated experience with formulating and implementing new technology procurement, specifically with government entities. Although the position will not be directly managing IT projects, strong procurement process knowledge and experience with contract management is critical.

**Effective At Building Relationships and Trust.** The position is responsible for maintaining strong relationships between and among the various CCAITA partners, interested parties, and the Board. It will be important for the Executive Director to recognize and communicate various perspectives, options and needs of the CCAITA while providing clear professional recommendations to the Board of Directors. The Executive Director will need to earn credibility among the various partners and stakeholders through mutual respect, listening, and effective communication.

1.4 Authority Contact for this RFP

The principal contact for the Authority regarding this RFP will be Rob Grossglauser, Interim Executive Director, [Rob.Grossglauser@ccaitjpa.org](mailto:Rob.Grossglauser@ccaitjpa.org) ("Authority Contact"). Respondents shall only contact the Authority Contact with questions or clarifications concerning this RFP and only via e-mail.

**2. PROPOSAL SCHEDULE**

The schedule is as follows:

1	RFP Release	August 25
2	Pre-Proposal Requests for Clarification Due	September 1
2a	Response to Clarification Requests	September 8
3	Proposal Due Date	September 15
4	Interviews (if required)*	September 18-22

5	Anticipated Final Selection**	October 10
6	Services Start	November 1

\*Proposers should be available for interviews during this week.

\*\*The Authority expects, but does not guarantee, that the contract award will be made by the Authority's governing body on the date indicated above.

### 3. REQUESTS FOR CLARIFICATIONS

All questions, requests for interpretations or clarifications, either administrative or technical must be requested in writing via e-mail and submitted to the Authority Contact. Questions sent to any other Authority staff, agent, or governing body member will not be addressed. Oral statements regarding this RFP by any persons should be considered unverified information unless confirmed in writing. To ensure a response, questions must be received in writing by 5:00 p.m. local time September 1, 2023.

Authority will respond to questions and suggested revisions to Exhibit 3 Agreement by posting an addendum(a) on the Authority's website <https://calassessorsit-jpa.com/> Authority will not be responsible for any explanations or interpretations provided in any other manner. No person is authorized to make any oral interpretation of any provision in the RFP and/or Agreement to any Respondent, and no Respondent should rely on any such oral interpretation.

### 4. PROPOSAL REQUIREMENTS

#### 4.1 Proposal Content

Respondent's Proposal shall be clear, accurate, and comprehensive. Excessive or irrelevant materials will not be favorably received. The content and sequence of the information contained in each copy of the proposal shall be as follows:

(a) Table of Contents

Include a clear identification of the material by section and by page number.

(b) Letter of Transmittal

If the Respondent is an individual, provide the name, email address, telephone number, and address. If the Respondent is a firm, identify the legal name and contact information, including corporate office and local office address, telephone number, fax number, web site address, and e-mail address. Summarize key elements of the proposal. The letter must stipulate that the cost proposal will remain valid for a period of at least 180 days. The letter shall be signed by an individual or individuals authorized to execute legal documents on behalf of the Respondent.

(c) Executive Director & Key Personnel.

If the Respondent is an individual, provide the individual's resume and/or curriculum vitae.

If the Respondent is a firm: (i) identify the person that will serve as the Director of the Authority; and (ii) identify the names and specific qualifications, experience of the proposed Director and any other persons to be assigned to perform Services. Include a resume for any person identified.

If the Respondent is a firm, the person identified as the Director must be authorized to sign an agreement for the firm and be responsible for day-to-day management of the Services. **By submitting the Proposal, Respondent agrees that the person identified as the Director will act in that capacity during the duration of the Services.**

(d) Plan for Services

Provide a plan for how the Respondent shall perform the services for the Authority. Indicate features, skills and/or services which distinguish Respondent and make it the better choice for the Authority. Indicate features, skills and/or services which will enable Respondent to provide the Services promptly, without delay or interference.

(e) Scope of Services

In addition to the Scope, clearly identify any other services that Respondent believes are required for the Services. Indicate why Respondent believes the additional services are necessary.

(f) Experience

(i) Prior Experience. List of representative services undertaken by Respondent in the last three (3) years, either as an independent contractor or employee, demonstrating experience in each aspect of the Services. Identify the names of organizations, and names and telephone numbers of persons who can be contacted with regard to the services you have provided.

(ii) List all public agencies, for which contracts were terminated in the last three (3) years. Show names of organizations and names and telephone numbers of persons who can be contacted. Respondents may provide a brief explanation of the reason(s) for termination(s).

(g) Proposed Compensation

Respondent must indicate whether it intends for the compensation to be paid as follows:

(i) Monthly installments;

- (ii) Billed hourly with monthly invoices; or
- (iii) An alternate compensation structure.

Respondent must provide its most current hourly rate sheet that will be used for extra services and/or if the Services are billed on an hourly basis.

Clearly indicate categories of reimbursable expenses and prices for each, as well as any associated mark-up. **If the Respondent fails to include these costs, Respondent waives any claim for compensation for such costs if selected.**

- (h) Agreement Revisions

Identify specifically all proposed revisions and/or objections to the Agreement (**Attachment 3**). This is the sole opportunity for Respondents to indicate exceptions and propose revisions to the Agreement. **Any exception or revision not included in the Proposal shall be rejected.**

The Authority reserves the right at any time, before or after award, to make revisions to the Agreement.

- (i) Certificate of Proposal

Include a fully completed copy of the Certificate of Proposal attached to this RFP as **Attachment 2**.

#### 4.2 Proposal Format

Proposals shall include one (1) electronic pdf version. Proposals shall be organized, tabbed, and numbered in the order presented above. Proposals must include page numbers for all pages in the proposal.

### 5. SUBMITTAL INSTRUCTIONS

Proposals must be submitted by email in electronic format to Rob Grossglauser, Interim Executive Director [Rob.Grossglauser@ccaitjpa.org](mailto:Rob.Grossglauser@ccaitjpa.org) ("Authority Contact") no later than 5:00 p.m. on September 15, 2023. Proposals submitted in any other way will not be considered. Respondents may withdraw a Proposal at any time prior to the proposal date and time for submittal of Proposals. The Authority does not intend to automatically transmit a confirmation of receipt, though it may elect to do so.

It is the sole responsibility of each Respondent to see that its Proposal is properly submitted to the Authority in the proper form and prior to the date and time indicated above. THE AUTHORITY WILL NOT ACCEPT LATE PROPOSALS.

#### EVALUATION AND AWARD

##### 5.1 Evaluation Criteria

The Authority will evaluate and rank the proposals. Proposals will be evaluated according to the following criteria:

- (a) The cost of the Services;
- (b) The resumes and prior experience of all personnel identified in the Proposal;
- (c) The ability, capacity and skill of the Respondent to perform the Services, and to so promptly, without delay or interference;
- (d) Whether the Respondent has demonstrated the competency and qualifications to perform the Services
- (e) Overall completeness and responsiveness of the Proposal;
- (f) Any other factor that the Authority determines is reasonably relevant to determining whether Respondent is qualified and competent to perform the Services.

#### 5.2 Respondent Presentations/Interviews

The Authority may, at its discretion, invite a shortlist of Respondents to participate in a panel interview to be held remotely by the Authority. The Authority may require that Respondents prepare a presentation as part of the interview. No Respondent shall be entitled to or otherwise guaranteed an interview.

#### 5.3 Selection, Negotiation, and Award

During the evaluation process, the Authority reserves the right, where it may serve the Authority's best interest, to request additional information or clarifications from Respondent, or to allow corrections of errors or omissions. The contract, if awarded, shall be to the Respondent which is the most qualified on the basis of the proposal, interview if held and evaluation criteria set forth herein.

Upon selection of a Respondent, the Authority will attempt to negotiate a mutually agreeable agreement with the selected Respondent. In the event that the Authority is unable to reach agreement, the Authority will proceed, at its sole discretion, to negotiate with the next Respondent selected by the Authority. The Authority reserves the right to contract for Services in the manner that most benefits the Authority including awarding more than one (1) contract if desired.

After negotiating a proposed Agreement that is fair and reasonable, Authority staff will make the final recommendation to the Authority's governing board concerning the proposed Agreement. Subject to the contract amount, the Authority governing board has the final authority to approve or reject the Agreement.

#### 5.4 Protests

- (a) Protest RFP Contents: Protests based on the content of the RFP shall be

submitted to the Authority no later than ten (10) calendar days prior to the scheduled proposal submittal deadline. If necessary, the proposal submittal deadline may be extended pending a resolution of the protest. A content protest must be filed in writing via email by transmitting it to Rob Grossglauser, Interim Executive Director, [Rob.Grossglauser@ccaitjpa.org](mailto:Rob.Grossglauser@ccaitjpa.org) (“Authority Contact”).

(b) Protest Award Respondent may protest a contract award if the Respondent believes that the award was inconsistent with Authority policy or this RFP is not in compliance with law. A protest must be filed in writing via email by transmitting it to Rob Grossglauser, Interim Executive Director [Rob.Grossglauser@ccaitjpa.org](mailto:Rob.Grossglauser@ccaitjpa.org) (“Authority Contact”) within five (5) business days after receipt of notification of the intended contract award. Any protest submitted after 5 p.m. of the fifth business day after notification of the intended contract award will be rejected by the Authority as invalid and the Respondent’s failure to timely file a protest will waive the Respondent’s right to protest the contract award. The Respondent’s protest must include supporting documentation, legal authorities in support of the grounds for the protest and the name, mailing address and e-mail address of the person representing the Respondent for purposes of the protest. Any matters not set forth in the protest shall be deemed waived.

(c) Authority Review: The Authority will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. The Authority shall provide the Respondent submitting the protest with a written statement concurring with or denying the protest. Action by the Authority relative to the protest will be final and not subject to appeal or reconsideration. The procedure and time limits set forth in this section are mandatory and are the Respondent’s sole and exclusive remedy in the event of protest. Failure to comply with these procedures will constitute a waiver of any right to further pursue the protest, including filing a Government Code claim or legal proceedings.

## **6. GENERAL PROVISIONS**

### **6.1 Amendments to RFP**

The Authority reserves the right to amend or revise the RFP and its attachments or issue to all Respondents a Notice of Amendment to answer questions for clarification. Amendments or revisions, if any, shall be made by written addenda. All addenda issued by the Authority shall be included in the proposal and made part of the Agreement. Copies of addenda will be issued by the Authority and posted to its website at: <https://calassessorsit-jpa.com/> Respondents must acknowledge receipt of all addenda to the Proposal. Respondents are responsible for ensuring that they have received any and all addenda. Each Respondent should contact the Authority to verify that it has received all addenda issued, if any, prior to the Proposal opening. Failure to acknowledge receipt of all addenda may result in Proposal rejection.

### **6.2 No Commitment to Award.**

Issuance of this RFP and receipt of proposals does not commit the Authority to award a contract. The Authority expressly reserves the right to postpone the RFP process for its own convenience, to negotiate any price or provision, task order or service, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Respondent concurrently, or to cancel all or part of this RFP. The Agreement, if any is awarded, will go to the Respondent whose proposal best meets Authority’s requirements.

### 6.3 Amendments to Proposals.

Unless specifically requested by the Authority, no amendment, addendum or modification will be accepted after the deadline stated herein for receiving Proposals. Respondent may modify or amend its Proposal only if the Authority receives the amendment prior to the deadline stated herein for receiving Proposals.

### 6.4 Non-Responsive Proposals.

A Proposal may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the Proposal.

### 6.5 Costs for Preparing.

The Authority will not compensate any Respondent for the cost of preparing any Proposal, and all materials submitted with a Proposal shall become the property of the Authority. The Authority will retain all Proposals submitted and may use any idea in a Proposal regardless of whether that Proposal is selected.

### 6.6 Alternative Proposals.

Only one final proposal is to be submitted by each Respondent. Multiple proposals will result in rejection of all proposals submitted by the Respondent.

### 6.7 Public Documents.

Proposals will become the property of the Authority and subject to the California Public Records Act. Those elements in each Proposal that are trade secrets as that term is defined in Civil Code section 3426.1(d) or otherwise exempt by law from disclosure and which are prominently marked as "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" may not be subject to disclosure. The Authority shall not be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosure is deemed to be required by law or by an order of the Court. A Respondent that indiscriminately identifies all or most of its response as exempt from disclosure without justification may be deemed nonresponsive. In the event the Authority is required to defend an action on a Public Records Act request for any of the contents of a response marked "Confidential," "Proprietary," or "Trade Secret," the Respondent agrees, by submitting a Proposal to this RFP, to defend and indemnify the Authority from all costs and expenses, including attorneys' fees, in any action or liability arising under the Public Records Act. All Proposals and all evaluation and/or scoring sheets shall be available for public inspection at the conclusion of the selection process.

### 6.8 Non-Discrimination

The selected Respondent and each of its (their) subconsultants and/or co-venture partners, shall comply with all applicable federal and California laws, including, but not limited to, Title VII of the Civil Rights Act of 1964, as amended, Executive Orders 11246, 11375, and 12086, the California Fair Employment and Housing Act beginning with Government code section 12900, Labor Code section 1735, and any other applicable federal and state laws and regulations hereinafter enacted, including the Federal Americans with Disabilities Act ("ADA"). Respondent shall be responsible for establishing and implementing an ADA program within the Firm's



workplace. Respondent shall not discriminate against any prospective or active employee based on race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status. The selected respondent shall cause the above provisions to be inserted in all subcontracts for any work covered by this RFP so that such provisions will be binding upon each subconsultant.

#### 6.9 Conflict of Interest

By submitting a Proposal, the Respondent declares and warrants that no elected or appointed official, officer or employee of the Authority has been or shall be compensated, directly or indirectly, in connection with the award of the Agreement or for any work for the proposed project. For the term of the Agreement, no elected or appointed official, officer or employee of the Authority, during the term of his/her service with the Authority and for two (2) years following his/her termination of office or employment with the Authority, shall have any direct interest in the Agreement, or obtain any present, anticipated or future material benefit arising therefrom.

## ATTACHMENT 1

### SCOPE OF SERVICES

The Director will generally be required to perform the following functions:

- a) Planning and organizing CCAITA meetings, overseeing the administrative operation in various areas such as: creating business plans, overseeing day-to-day activities, organizational strategy of the IT system, finances, interaction with the Department of Finance, vendor engagement, and stakeholder relationships to achieve the organization's mission and goals.
- b) Under the direction of the CCAITA Board of Directors, the Executive Director will perform duties of a chief executive officer, including:
  - i) Manage the everyday activities and performing the duties normally the responsibility of an Executive Officer;
  - ii) Staff the Board, the Executive Committee, and other committees as appropriate;
  - iii) Coordinate with special project partners, such as the Prop 19 Subcommittee;
  - iv) Manage project vendors and consultants to ensure project goals are on target;
  - v) Advise the Board on management needs, and contract efforts for IT services and support as needed;
  - vi) Coordinate with the CCAITA Legal Counsel and others on the various issues and responsibilities related to agency activities;
  - vii) Interact with the Department of Finance to ensure future funding rounds, and required project reporting under State law;
  - viii) Prepare, recommend a DRAFT budget and coordinate the annual audit required by the California Department of Finance (DOF);
  - ix) Coordinate with Client's Legal Counsel on required administrative duties including records retention and public records archives; and,
  - x) Maintain financial records, perform treasury duties and present quarterly financial reports to Governing Body
  - xi) Perform other duties as assigned or required.
- c) Duties and services do NOT include any selection nor decision regarding IT contractors, vendors, partners for Client. Client shall make all decisions as to which IT contractors, vendors, or partners to utilize. After Client formally decides which entities to contract with, Executive Director will support the technical procurement processes for said contracting.

**ATTACHMENT 2  
PROPOSAL CERTIFICATE**

**CERTIFICATION OF PROPOSAL TO THE CALIFORNIA COUNTY ASSESSOR'S  
INFORMATION TECHNOLOGY AUTHORITY**

1. The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to the Authority in accordance with the Request for Proposal (RFP), dated August 25, 2023, and to be bound by the terms and conditions of the RFP.
2. The Respondent has carefully reviewed its proposal and understands and agrees that the Authority is not responsible for any errors or omissions on the part of the Respondent and that the Respondent is responsible for them.
3. It is understood and agreed that the Authority reserves the right to accept or reject any or all proposals and to waive any informality or irregularity in any proposal received by the Authority.
4. The proposal includes all commentary, figures and data required by the Request for Proposal, dated August 25, 2023, including any addenda issued thereafter.
5. Respondent has carefully read and fully understands all terms and conditions of the RFP.
6. The proposal shall be valid for 180 days from the date submitted to the Authority.

Name of Respondent: \_\_\_\_\_

By: \_\_\_\_\_  
(Authorized Signature)

Type Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

E-mail: \_\_\_\_\_

**ATTACHMENT 3**  
**FORM PROFESSIONAL SERVICES AGREEMENT**