STATE OF CALIFORNIA

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NO. 2022-11028
REQUEST FOR INFORMATION
BOE IT Modernization

Release Date:

January 23, 2023

ISSUED BY:

CALIFORNIA STATE BOARD OF EQUALIZATION

C/O

CALIFORNIA DEPARTMENT OF TAX AND FEE ADMINISTRATION

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A. PURPOSE

To: Interested Respondents

Subject: Request for Information (RFI) 2022-11028, Information Technology Modernization.

The State of California Board of Equalization (BOE) is releasing this Request for Information (RFI) to gather data on the current market research for design, development, and implementation of a new Board Roll System.

B. OBJECTIVE

The overall goal of this RFI is to collect information from interested parties with the necessary skills and experience in designing workload and case management systems and technology needs and to gather responses to the questionnaire included as Appendix 2 to this RFI. The BOE will use this information to develop and finalize requirements to be placed either in a Leveraged Procurement Agreement (LPA) Request for Offer (RFO) utilizing either a California Multiple Award Schedule (CMAS), Master Services Agreement (MSA) procurement vehicle, Invitation for Bid, or Request for Proposal.

C. KEY ACTION DATES

Action	Date
RFI Release	January 23, 2023
Vendor Submission of Written Questions	January 27, 2023 4:00 p.m.
BOE Response to Written Questions	February 2, 2023
Response to RFI Submission Due	February 13, 2023

D. RESPONDING TO THIS RFI

If interested in participating in the RFI, please complete Appendixes 1 and 2. Submit your response to acquisitionscoor@cdtfa.ca.gov by the RFI submission date listed in the section labeled, “Key Action Dates”.

Contact Amber Van Alstyne at (916) 309-5429 with questions regarding this RFI.

E. BACKGROUND

1) Current Business and Technical Environment

In accordance with Section 19, Article XIII of the California Constitution, the BOE is responsible for assessing property owned or used by certain public utilities and other specified companies operating in California, enabling counties to use those values to collect local property taxes. Property values on the state-assessed roll are allocated by the BOE to the counties where the properties are located. Each county levies, bills, and collects the tax directly from state assessees, based upon the allocated values. The taxes are levied at the same rate that is applied to locally assessed property. BOE annually assesses (1) pipelines, flumes, canals, ditches, and aqueducts lying within 2 or more counties (intercounty) and (2) property, except franchises, owned or used by regulated railway (railroads and private railroad cars), telegraph, or telephone companies (includes interexchange and commercial mobile radio service that can classified as regulated companies), car companies operating on railways in the State, and companies transmitting or selling gas or electricity (gas and electric companies). The first category of property consists of specific types of improvements, that is, pipelines, flumes, canals, ditches, and aqueducts lying within two or more counties. The second category of property consists of all taxable property, excluding franchises, owned or used by regulated railway, telegraph, or telephone companies; car companies operating on railways in the state; and companies transmitting or selling gas or electricity. Rather than being based on the type of property to be assessed, this category includes all of the property that is owned or used by specified types of companies. Under this category, all of the property owned or used by a specified company is subject to the Board's assessment. The BOE uses the California Department of Tax and Fee (CDTFA) as a technology and infrastructure service provider.

2) Problem Statement

BOE would like to modernize the systems that support the BOE's State-Assessed Properties Division (SAPD). SAPD is responsible for annually preparing property value recommendations for state assessed properties for each state assessee (taxpayer). These indicators and recommendations, which are developed annually from information provided by state assessees, are used by the elected Board to determine the fair market value of the assessees unitary property which generates approximately $2 billion in property tax annually for schools and local governments. The current system is antiquated and uses manual processes subject to human error to complete the valuation and allocation. The modernization will streamline the Board Roll process so that timelines are met and improve audit capacity to ensure accuracy of the Board Roll valuation and allocation. In addition, the BOE intends to redesign the Board Roll System to add increased value to the overall operations and capabilities to better serve our audiences, including but not limited to state assessees, tax professionals, business owners, BOE team members, the public at large, other California agencies and organizations, and the media.

3) Objectives for IT Modernization

The proposed BOE Modernization Project will focus on creating process improvements resulting in efficiencies, new service options, and increased revenue. (For more information on the Board Roll Process, please see the following link: https://www.boe.ca.gov/proptaxes/sappcont.htm#Description

F. SCOPE OF VENDOR TASKS

The proposed project will automate the Board Roll business processes with real-time validation, data capture, and audit detection for property statements, and business documents. It will include the following components:

1) Business Improvements

i) Provide capabilities to maintain and manage rules without the need for coding such as adjustments made to an entities state assessed property value and audit findings.

ii) Improve case selection, and workload management by prioritizing new and existing cases.
iii) Improve enforcement tools for audit team members in order to increase **audit modeling and fraud detection** using new data and dynamic modeling strategies.
iv) Correspondence imaged and routed electronically allowing for efficient case assignment and processing of work.
v) Decommission aged legacy systems that are outdated and siloed.

2) Case and Workload Management

i) Improve case selection, workload management, and knowledge management.
ii) Move all Board Roll business systems on to one enterprise case and workload management system by adding audit, collections and filing enforcement.
iii) Create new user specific dashboards based on security and business needs.
iv) Automate manual business processes.

3) Improved Analytics

i) Provide a centralized warehouse making data accessible to legacy systems, users and enterprise data modeling mart.
ii) Provide search capabilities that allow users to narrow in on data based upon defined user selected parameters.

4) New Self-Service Options for State Assessees (possible functionality)

i) Secure access, and submission of property statements, schedules, and/or supporting documents, and payments.
ii) Registering as a new state assessee to report state assessed properties.
iii) Filing an appeal to a BOE issued notice including approved property values and adjustments.
iv) Filing and viewing property assessments and supporting documents.
v) Viewing payments and accounting details.
vi) Viewing correspondence and notices
vii) Updating address, contact information and state assessed property.
viii) Secure chat
ix) Sending and receiving emails to assessees.
x) Filing a statement of authorizations for property statements signed by an employee or agent who has been designated by the assessee.

5) Technical Requirements

i) Understanding the BOE vision, goals, and objectives, as well as the Board Roll program's needs to provide a robust system.
ii) Recommend user-centric data visualizations, reports, and graphics to communicate key BOE Board roll information to state assessee, BOE team members, and Board Members.
iii) Proposal on how to maximize the user's experience, improve the current user experience, and deliver a responsive and user-centric system.
iv) Ensuring that the final product meets stakeholder needs, can be easily and logically navigated, and is accessible to all visitors.

v) Recommend and develop a security strategy and governance process to ensure that the new system and its hosting environment is protected from unauthorized access.
vi) Test the functionality, usability, and accessibility of its content as well as ensure public facing user interfaces are California AB 434 and WCAG 2.2 compliant.
vii) Integrations with (but not limited to) Grooper (document capture software), box.com (enterprise content management) and services such as Microsoft Power Platform.
viii) Provide knowledge transfer to CDTFA technical staff on the design, development, and maintenance of the new system which will written documentation, hands-on training, mentoring, and installation and configuration walk-throughs with staff.
ix) Plan, design, and deliver formal classroom training (classroom provided by BOE).
x) Solution must be SaaS or installed in Azure GovCloud.
xi) Ability to integrate with an ePay or electronic payment system.

G. RFI RESPONSE INSTRUCTIONS

BOE requests that interested vendors submit responses regarding their workload and case management skills, experience, services and technologies. At a minimum, vendors should respond to all the questions contained in Appendix 2. Any information not specifically requested, but which the vendor deems important and relevant, is also requested.

1) Appendix 1

The RESPONSE SUBMITTAL COVER PAGE provides is a general coversheet to be completed by firms. Please complete and submit the cover page with your RFI responses to the questions in Appendix 2 to AcquisitionsCoor@cdtfa.ca.gov by the Key Action Date.

2) Appendix 2

The REQUEST FOR INFORMATION (RFI) QUESTIONNAIRE requests interested vendors to provide information regarding their case and workload management skills and experience. Please respond to all questions. The CDTFA may use any or all this information to develop and finalize requirements to be placed in a procurement.

H. DISCLAIMER

1) This RFI is issued for information and planning purposes only and does not constitute a solicitation. A response to this RFI is not an offer and cannot be accepted by the State to form a binding contract.

2) This RFI is solely designed to provide BOE with meaningful information to enable BOE to determine how to proceed with the development of the BOE IT Modernization solicitation.

3) RFI Respondents are solely responsible for all expenses associated with responding to this RFI. The State is not responsible for any expenses associated with responding to this RFI.

4) The submission of a response does not constitute any commitment on the part of the interested party. However, the RFI Respondent agrees that the submitted information is correct to the best of the RFI Respondent's knowledge. Also, the right to compete in future

procurements is not affected in the event that the party chooses not to submit a response to this RFI. BOE is also interested in learning the reasons for not submitting a response.

5) RFI Respondents are advised that all documents submitted in response to this RFI will become the property of the State of California and will be regarded as public records under the California Public Records Act (CPRA) pursuant to Government Code section 6250 et seq. The State is not requesting a solution. The intent of this RFI is only to validate project objectives and requirements for possible future solicitations. Please do not include any confidential or proprietary information in responses to this RFI as it will be subject to the CPRA and may be disclosed to the public under the CPRA.

APPENDIX 1

RESPONSE SUBMITTAL COVER PAGE

RFI:	NO. 2022-11028 BOE IT Modernization
Company Name:	
Company Address:	
Contact Name:	
Phone Number:	
E-Mail:	

APPENDIX 2

REQUEST FOR INFORMATION (RFI) QUESTIONNAIRE

Please respond to all questions completely and thoroughly maintaining the section references. Innovation and creativity are encouraged in responding including links, brochures, and digital, or electronic examples.

A. Background/Experience

1. Does your company have current or historical experience relating to the design and development of workload and case management implementations? If so, what is the experience?
2. Does your company have current and historical customers, that are comparable in size and scope to BOE? If so, what is the experience?
3. Does your company have current or historical experience relating to Stakeholder engagement, polling, and analysis? If so, what is the experience?
4. Does your company have a California Multiple Award Schedule (CMAS), Master Services Agreement (MSA), and/or Software License Program (SLP) that offers services and labor classifications relevant to CDTFA's anticipated scope of work for the design and development of case and workload implementations? If so, what is the agreement type (CMAS or MSA) and agreement number?

B. Outreach and Customer Engagement

1. What tools and methodology you would use for ensuring that the final design is customer-centric and responsive?
2. What type and quantity of engagements with the various stakeholder groups would you recommend conducting and adequately identify the customer requirements?

C. Technical Capabilities

1. Will the proposed solution be Software as a Service (SaaS) or Commercial-Off-The Shelf (COTS), or other?
2. Will the solution integrate with Grooper, Box.com, and Microsoft Power Platform? If so, what is the additional cost for integrating with other software.
3. Has your solution interfaced with California county assessors or state property at other agencies in the past? If so, please explain how?
4. Are there integrations with certain data sources that your company would recommend for a solution like this?
5. Do you have a list of data sources that you have previously integrated with? If so, please provide this list and a short description of the data source.
6. What technical team, including the organizational structure, staffing, roles, qualifications, and vendor certifications would you recommend for the anticipated scope of services needed by CDTFA?
7. What approach would your company use to design and develop a workload and case management solution?
8. What type of infrastructure is required to support the solution that you are proposing?
9. What technology platform will be required and if needed, can the software run on a virtual server environment?

D. Training and Knowledge Transfer

1. What tools and methodology would your company employ for providing training, mentoring, and knowledge transfer to business and technical staff?

E. Additional Information

1. Please provide any additional information not requested above, but which you deem important and relevant to this RFI.