**Instructions: Please supply all requested information in the areas shaded yellow and indicate any attachments that have been included to support your responses.**

**Respondent may provide either or both services described in Section 1.4. Respondent should not include answers below for the service that respondent does not intend to provide.**

***Technical Proposal***

* + 1. **General Requirements and Definitions**
       1. Please list any additional terms and definitions used by your company or industry that you would like the State to consider incorporating in the contract. The State will not accept terms and definitions introduced after award during contract finalization and implementation.

|  |
| --- |
| **Additional Definition:**  “**Trade Secret** Any practice or process of a company that is generally not known outside of the company, giving the company an advantage over its competitors and is often a product of internal research and development. The Contractor’s cost model spreadsheets that it has developed to generate the cost tables for Moore Precision Cost® are Trade Secrets.”  This definition relates to the proposed paragraph C of Section 36 of the Professional Services Contract in Att B. |

* + - 1. Please confirm you have carefully reviewed all requirements listed in RFP Section 1.4. Should your company have any exceptions, substitutions, or conditions for the State’s consideration, please list them below. The State will not accept exceptions, substitutions, or conditions introduced after award, during contract finalization and implementation.

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| --- |
| We confirm that we have carefully reviewed all requirements listed in RFP Section 1.4 with respect to turnkey construction cost services. |

**2.4.2 Right to use construction cost data.**

1. Describe your firm’s real property construction cost schedules, particularly as they pertain to the following:
   1. Market segmentation analysis.
   2. Assembly data.
   3. Component data.
   4. Unit-in-place data.
   5. Direct labor and material costs.
   6. Indirect expenses required to construct an improvement (e.g., architectural design, permits, and builder profit).
   7. Trends in housing development (e.g., tiny homes, living spaces in pole barns, Quonsets with tarp roofs, home generators, solar options, mixed use properties)

Not Applicable, we are not responding to Section 1.4 A. 1)

1. Describe your firm’s ability to provide construction cost data that represents the typical, or average, building costs, including labor costs in the Indianapolis, Indiana area.

Not Applicable, we are not responding to Section 1.4 A. 1)

1. Please state the availability of your firm’s real property construction cost schedules, which the Department desires by September 1 annually, starting in 2024.

Not Applicable, we are not responding to Section 1.4 A. 1)

**2.4.3** **Conversion services and training**

1. Describe your firm’s capacity to provide conversion services of construction cost data into the DLGF’s existing table formats, including the following:
   1. the years of experience you have providing this service;
   2. the work expected to be performed;
   3. the number of hours projected;
   4. how hours will be tracked; and
   5. the per hour cost estimated to provide this service.

If you are using a third-party source to provide services, please explain the source data that would be used.

a. The company Principal has over 30 years of broad experience providing conversion services of construction cost data throughout North America and specific experience 12 to 14 years ago converting cost data into DLGF’s existing table formats. The company provided very similar services for the Illinois Department of Revenue five years ago.

b. The work to be performed is conversion services of construction cost data into the DLGF’s existing table formats in accordance with RFP Section 1.4.

c. The company proposes to deliver the services on a fixed price basis and will expend the hours necessary to satisfactorily provide the conversion services.

d. Because the services will be performed for a fixed price, hours will not be tracked.

e. Should the DLGF request other services beyond the scope of the RFP, the hourly fee will be Two Hundred Fifty ($250.00) Dollars per hour.

No third-party source will be providing services for the Contractor.

1. Describe your firm’s capacity to complete conversion services before December 1, 2025.

We can complete conversion services before December 1, 2025 if the contract is awarded and fully executed no later than November 20, 2024.

1. Describe your firm’s capacity to update the DLGF’s table formats due to changes in building trends, including materials and preferences. Please detail the following:
   1. The work expected to be performed.
   2. The number of hours projected.
   3. How hours will be tracked.
   4. The per hour cost estimated to provide this service.

a. The company keeps its Trade Secret cost models and spreadsheets up-to-date each year by reviewing building trends and materials as an integral part of keeping its Moore Precision Cost® product competitive. Thus, updating is integral to the work being done.

b. The company expends as many hours as necessary to keep the Trade Secret models and spreadsheets, which will be used to produce the DLGF’s existing table formats, current and reflective of actual costs in the construction industry.

c. The hours will not be tracked.

d. There is no extra charge for providing this service because it is an integral part of what the Contractor already does.

1. Describe your firm’s capacity to provide technical and training assistance in using the real property construction cost information, including the following:
   1. The total hours of assistance to be provided.
   2. How the hours may be tracked.
   3. The estimated total expenses to provide assistance.
   4. The per hour cost.
   5. The nature of the deliverables.

**During the first contract year:**

a. Contractor shall provide a maximum of one hundred twenty (120) hours of on-site technical and training assistance during two monthly visits to the DLGF office of five (5) hours each if desired by the DLGF.

b. The DLGF will be able to track the hours by noting the arrival and departure times of the company’s consultant.

c. The maximum total cost for the first year of on-site technical and training assistance is Thirty Thousand ($30,000) Dollars if all hours are desired by the DLGF, which is included in the stated fixed price fee.

d. The hourly rate is Two Hundred Fifty ($250.00) per hour.

e. During each visit, the consultant will update the DLGF staff on project progress and answer all DLGF staff questions.

**During the second contract year:**

a. Contractor shall provide a maximum of sixty (60) hours of on-site technical and training assistance during one monthly visit to the DLGF office of five (5) hours if desired by the DLGF.

b. The DLGF will be able to track the hours by noting the arrival and departure times of the company’s consultant.

c. The maximum total cost for the second year of on-site technical and training assistance is Fifteen Thousand ($15,000) Dollars if the maximum hours are desired by the DLGF, which is included in the stated fixed price fee.

d. The hourly rate is Two Hundred Fifty ($250.00) per hour.

e. During each visit, the consultant will update the DLGF staff on project progress, discuss improvements, and answer all DLGF staff questions.

**Additional Assistance:** During both contract years, Contractor shall provide a maximum of two (2) hours of scheduled conference call or Zoom support for technical and training assistance, which shall be included in the fixed price contract fee. Contractor will track and report these conference call and Zoom hours.

1. Describe your firm’s capacity to provide a formula or process for updating cost information on an annual basis, including the following:
   1. The total hours of assistance to be provided.
   2. How the hours may be tracked.
   3. The estimated total expenses to provide assistance.
   4. The per hour cost.
   5. The nature of the deliverables.

The process of updating cost information (tables) on an annual basis for use by assessing jurisdiction in North America is the primary work that our firm does annually using our Trade Secret models and spreadsheets. These proprietary models and spreadsheets will be adjusted to produce the DLGF’s specific table formats. Our firm will produce the DLGF’s table formats and deliver them to the DLGF in the second contract year and following years for the stated second-year fee if desired by the DLGF. If the DLGF desires to update the tables in-house, the Trade Secret models and spreadsheets will be licensed to the DLGF using the End User License Agreement (EULA) that is provided as an attachment to this submission. The second-year fee will be the same in either case. As stated in RFP paragraph 1.4 E. 2, “. . . the vendor will be ultimately responsible for producing the final product.”

a. The company expends as many hours as necessary to keep the Trade Secret models and spreadsheets current and reflective of actual costs in the construction industry.

b. The hours will not be tracked because updating cost information on an annual basis benefits all users of Moore Precision Cost®.

c. The total expenses are part of the stated annual fixed price fees.

d. The firm’s hourly rate is Two Hundred Fifty ($250.00) per hour, but will not be used to compute fees unless the DLGF requests work be done that is clearly beyond the scope of RFP 215-24-77471 and the State executes a contract addendum for the work.

e. The work to be performed and nature of the deliverables consists of conversion services of construction cost data into the DLGF’s existing table formats in accordance with RFP Section 1.4.

1. Describe your firm’s capacity to provide a turnkey solution to providing the real property construction cost schedules, including depreciation tables, in an electronic format, for distribution to the counties. Please state the nature of the documentation used for purposes of future maintenance of the cost and depreciation tables.

Providing turnkey solutions of construction cost schedules for assessing jurisdictions is the work that our firm does through its Moore Precision Cost® product, hence it must maintain the continuous capacity to do so at the highest possible level in a competitive business environment. The firm has advertised in the publications of the International Association of Assessing Officers (IAAO) and exhibited its Moore Precision Cost® product at annual IAAO conference every year for the past ten years.

The DLGF’s existing table formats will be delivered in Excel® Workbook format.

The primary documentation used for future maintenance of the cost tables will be the current and future Real Property Assessment Guidelines adopted by the Department of Local Government Finance (DLGF), and in particular, Appendix-D General Commercial Models, with respect to commercial and industrial structures.

If the DLGF executes licenses for the Trade Secret models and spreadsheets in order to do future cost table maintenance in-house, the licensed spreadsheets will have notes and page references to the cost source publications.