

Bosque Central Appraisal District

REQUEST FOR PROPOSALS

COMPUTER ASSISTED

MASS APPRAISAL SOFTWARE

June 13, 2022

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I. GENERAL INFORMATION

A. GOAL

To acquire and implement a fully integrated appraisal system that includes hardware analysis, software system, with ongoing maintenance & support with emphasis on:

- Maximizing the efficiency of the staff with automated tools,
- Increasing appraisal accuracy, uniformity, and analysis capabilities.
- Fully integrating with GIS technology,
- Providing the utilities and flexibility to accommodate the changes that are inherent with an appraisal district,
- Providing the avenue for continued excellent service to our taxpayers and taxing units in the most cost-efficient manner.
- Ability to integrate with new technologies
- Strong online presence
- Remain current on legislative changes and updates

B. INTRODUCTION

The purpose of this document is to provide the *Bosque Central Appraisal District (The Office)* with a strategic tool for acquiring and implementing the automation system outlined above. This document will be used as an instrument to evaluate and select the most appropriate computer software and hardware system for *The Office* to assure the maximum benefit of their investment in time, money and human resources.

The *Office* is seeking to enhance overall communications and improve the effectiveness of the entire organization and better serve the community. To that end, *The Office* is soliciting proposals for a new comprehensive, fully integrated, software and hardware system to replace the existing systems currently in use. The new system will include, but is not limited to, hardware upgrade as needed and software for automated mass appraisal administration in accordance with Texas State Law, Texas Property Tax Code, State Comptroller's Office Property Tax Division and USPAP (Uniform Standards of Professional Appraisal Practice) standards. The new system will also include document archival hardware and software, document imaging software, and full integration with our current Geographic Information System (GIS) systems. The terms "new system", "software system", and "new software system", "new comprehensive software and hardware system" will all have the same meaning, as defined by this paragraph, throughout this document.

The Office receives funds on a quarterly basis from 22 taxing units (entities). ***The Office currently has 22,000 parcels and 7 appraisal users, 1 vendor station and 2 public users.*** ***The Office is currently using Aumentum Technology, aka Mars.*** In order to continue to accomplish our goals and minimize increased personnel costs, we must have a vendor and vendor's software system that will completely and efficiently serve our current and future needs. Equally important to *The Office* is the ability of the system to accommodate future advances in technology and growth.

The Office is going to upgrade the PCs and Laptops to Windows 10. However, the server will need evaluation as to size and space. The vendor should review current hardware and specify the type and cost of any upgrades and/or replacements to properly operate the system. It is *The Office* intent to greatly improve and enhance productivity and control the cost of data processing.

The Office is only interested in proposals that offer a total solution for automating all functions of *The Office*. The total solution must also include query tools, form processing, report generating capabilities, mass capabilities for all approaches to value, ARB processes and an online presence meeting the legislative mandates. *The Office* requires that the vendor be the original author and support organization for all application software.

The Office will accept proposals for turnkey total solution systems only. The successful vendor will be considered the prime contractor. *The Office* requires that the prime contractor obtain all agreed upgrade to hardware and application software licenses, install all hardware, convert *The Office* databases and train *The Office* staff. The software must provide the staff with the capability for management of all processes in *The Office*, relying on the proposer to assist in daily and annual processes if necessary.

C. CURRENT TECHNOLOGY INFRASTRUCTURE

The Office currently utilizes **Mars CAMA system with Aumentum Technology, subsidiary of Manatron**, and in house/BIS Consultants for GIS and mapping solutions,

Current hardware will need analysis to identify if sufficient or if and what will need to be replaced and/or upgraded. This should include a review of scanning equipment, desktop printers, system printers, PCs and Laptops. Additionally, *The Office* is open to discussions, presentation and cost breakout for field devices. This will be considered an add-on and should be separate from the overall cost proposal.

II. GENERAL REQUIREMENTS

A. Modern Technology

The reason for procurement is to accommodate the expanded capacities and requirements of our operations and to secure a system that allows us to take full advantage of the latest advances in computing and information processing technology within budgetary constraints.

The new system must satisfy the following requirements:

- Be responsive to the functional needs of departments.
- Be sufficiently flexible in both functional and technical designs to easily accommodate future changes as required by Texas State Legislature, changes in technology as well as business environment.

Incorporate advances in computing and communications technology, such as:

- Current technology for application development
- Distributed and on-line data entry
- Structured systems design (fully normalized)
- Tools to create ad-hoc reports
- Capability to integrate with Scanning, Imaging, GIS databases, handheld Appraisal applications, and any future compliant products.
- Capability for Sales analysis and Neighborhood building
- Capability to ftp, import and export
- Capability to support online appeals processes and electronic communication
- Capability to support oil and gas valuations

B. Compliance

The new relational software must support all mass appraisal approaches, data analysis, defense and be user friendly according to Texas State Law, Texas State Tax Code, Texas Property Tax Division Rules and USPAP standards.

C. Proven and Progressive

The new relational software system is envisioned to represent proven state of the art technology employing features that are on-line, real-time, within a fully integrated environment. It must provide flexibility and ease of maintenance to effectively handle changes in *The Office* business rules. Input and inquiry screens should be user-friendly with well-developed, easy to use documentation and on-line help features. Overall, the new system should provide the user with ready access to all necessary information, have a good response time, reduce paper shuffling, provide easy importing and exporting of any and all data and be cost effective to operate.

D. Integration

The key to the new software package is to apply full integration of all components or modules. These components should share information and thus, reduce duplicative data entry and storing redundant information. The information stored should be normalized using the Rules of Data Normalization.

E. Innovative

It is required that Vendors offer their best solution to meet *The Office* system needs as defined in this document. *The Office* will not tailor these needs to fit solutions a particular Vendor may have available. However, *The Office* does encourage innovative ideas for hardware and software that will result in enhanced overall operations for *The Office*.

F. Maintenance

The Vendor will be required to engineer, design, program, install, convert data, test and maintain the new system that will provide complete services for *The Office*. *The Office* will accept proposals for turnkey total solution systems only. Vendor must be the sole responsible party throughout the delivery, installation, training, warranty, and maintenance periods. Any subcontractor utilized by the Vendor must be identified in the proposal with description of the assignments they will perform. A change of subcontractors throughout the installation, warranty, or maintenance periods requires the prior written approval of *The Office*. The Vendor will have ultimate responsibility for all subcontractors utilized for this project. The Vendor must provide a project manager as a single point of contact for *The Office* throughout the planning and implementation of the project.

III. PROPOSAL EVALUATION PROCEDURE

The Office must receive 6 printed copies, and one digital version (pdf format on usb drive or CD/DVD) of every proposal, in sealed envelope(s) with proper identification no later than Friday, **August 5, 2022 at 5:00 pm**. Requests for extensions of the closing date or time will NOT be granted. Partial bids will not be accepted. Proposals arriving late will not be considered. Proposals arriving by fax will not be considered. Vendors should allow sufficient mailing time to insure the timely receipt of the proposal.

Address proposals to:

Attn.: Justin Neuman
Bosque Central Appraisal District
PO Box 393
9293 HWY 6
Meridian, TX 76665

Mark Envelope: MASS APPRAISAL SYSTEM PROPOSAL

A. Vendor Information

Vendors must submit information about the organization, including:

1. description of the company
2. parent or subsidiary status
3. description of all business activities engaged in by Vendor
4. number of employees
5. complete list of customers in Texas currently utilizing the product proposed
6. specifically identify customers with the vendor less than 2 years

B. Vendor Business Philosophy

The Office will not evaluate Offers on technical specifications alone. Equally important is the business relationship between the client and the Vendor. In order for *The Office* to become more familiar with your company, Vendors must submit the following:

1. Mission Statement
2. Short Term Goal List
3. Long Term Goal List
4. Support Perspective
5. Customization Perspective
6. Software Enhancement Plan
7. Staffing Perspective
8. Legislative Changes Plan

C. Vendor Background and Qualifications

1. *The Office* will only enter into an agreement for a new system (as outlined in the Introduction) with a Vendor qualified by experience, a proven Texas product and operating with financial stability.
2. The Vendor must be a reputable firm currently performing within the State of Texas, software installation, conversions and support with skilled, fully trained technicians capable of performing a first-class installation and conversion in accordance with standard industry practices. All Vendor technicians must be experienced with the programs and equipment they are to install and /or support. The technician working with *The Office* must have completed at least one full conversion project within Texas within the last two years.
3. The Vendor must have installed, converted, supported and maintained the product(s) offered to *The Office* in a Texas appraisal district and/or County Tax Office for a minimum of one (1) year. The vendor must be able to accommodate an office and project of our size or greater.

D. Manufacturer Affiliation

1. Vendor must be the original author and developer of the source code offered for the software system.

E. Reference List

1. In order to meet the long-term requirements of *The Office*, the prospective vendors must demonstrate their experience in Texas Appraisal Districts & County Tax Offices. The vendors should include a list of all Texas Appraisal Districts currently running the proposed application software in Texas.
2. Vendor must provide a list of references from a minimum of four (4) clients. Each reference solicited must be a paying customer external to the Vendor's organization. The Vendor must have supported and maintained the referenced systems. The Vendor must have been the original developer of the referenced systems. For listed references, include company/organization name and address of installation, description of software installed (including number of servers, installation date, etc.) and the name and telephone number of the contact person.

Two references from customers of 5 years or longer
Two references of new customers of 2 years or less

3. Vendor must provide names, addresses and contacts for any client vs. Vendor and/or Manufacturer litigation for the past three (3) years (including any current litigation).

F. Registration of Vendor

Any corporation conducting business with *The Offices* shall be on file with the Secretary of State, State of Texas, as being incorporated under the Texas Business Corporation Act, or, if a foreign corporation, have procured a certificate of authorization for the right to transact business within the State. If Vendor is a limited partnership, it shall have on file with the Secretary of State, its certificate for the formation of a limited partnership as required by the Texas Uniform Limited Partnership Act, Article 6132a, V.A.C.S.

Vendors shall provide their certificate of registration number on the proposal sheet.

G. Submission of Proposals

Vendors desiring to submit proposals in response to the request must comply with all mandatory submission requirements set out in this document. Failure to comply with any section will subject the proposal to immediate rejection. However, any mandatory submissions are not the sole requirements. All conditions and requirements throughout this request are considered binding.

H. Multiple Proposals

A Vendor may submit only one proposal.

I. Authorization to Bid

An individual who is authorized to act on behalf of the Vendor must sign all proposals, attachments to proposals and/or documents submitted with this proposal.

J. Submission of Vendor Contracts

A proposal must include contract forms that the Vendor intends to use during contract negotiation. However, in making a contract award, *The Office* shall not be bound by any conditions as necessary. *The Office* may, however, reject any proposals where contractual terms are deemed unreasonable.

K. Vendor Inquiries

Any inquiries from Vendors concerning this proposal shall be submitted in writing but a delayed response does not extend the submission deadline.

Justin Neuman, Deputy Chief Appraiser
Bosque Central Appraisal District
PO Box 393
9293 HWY 6
Meridian, TX 76665
Justin.Neuman@bosquecad.com

L. Proposal Cost Errors

Vendors are expected to thoroughly examine all proposed specifications and all instructions. Preparation of cost extensions shall be at the Vendor's risk. In the event of a Vendor error in any cost extension, the Vendor's unit price will prevail.

M. Product Information

Complete product information and descriptive literature shall be submitted with the proposal. Information submitted shall be sufficiently detailed or substantiate that offered products meet or exceed the specifications. Vendor is hereby put on notice that all information submitted according to this requirement would be incorporated by reference in the contract document arising out of Vendor's response and may subject to express contract warranties.

N. Benchmark Criteria

Qualified Vendors may be asked to demonstrate their products to *The Office*. Vendors selected for product demonstrations must demonstrate that their product meets their response to the proposal. Failure to demonstrate that the product meets specifications will cause rejection of Vendor's proposal. Demonstrations will be by invitation, based on proposal, cost, and references. This is at the discretion of the Chief Appraiser, Chris Moser.

O. Installation, Integration and Testing

Vendors shall provide an installation, implementation and testing schedule for hardware, application software, database conversion and training with the proposal. All hardware purchased shall be installed within sixty days of contract award unless otherwise specified by *The Office*.

Vendor's installation, implementation and testing plan shall describe the integration and testing of hardware, software and databases of the proposed system. All application software and operating system software shall be installed sixty days after contract award unless otherwise specified by *The Office*. After completion of testing, training on application software will begin as defined in the Vendor proposed installation plan.

P. Proposal Evaluation

The Office will evaluate all proposals. Proposals that do not meet mandatory requirements shall be rejected. Proposals meeting the mandatory requirements shall be further evaluated on overall costs and ability to meet the long-term needs of *The Office*. The term "overall costs," as used in this paragraph, shall be interpreted to include -- but not be limited to -- the cost of installment, conversion, training, product price, expansion capabilities of hardware, facility modifications required to house and operate the hardware and impact on staff.

Q. Rejection of Proposals

We reserve the right to reject any and all proposals received. We do not intend to pay for information solicited or contracted for prior to entering into a contract with the successful Vendor.

We reserve the right to waive minor deviations in proposals providing such action is in the best interest of *The Office*. Minor deviations are defined as those that have no adverse effect upon *The Office* interest and would not affect the amount of the proposal by giving a Vendor an advantage or benefits not enjoyed by other Vendors.

We reserve the right to reject any or all proposals, to waive technicalities or formalities, and to accept any proposal deemed to be in the best interest of *The Office*. If we receive no valid proposals, *The Office* reserves the right to negotiate on the best terms and conditions at the best possible prices.

R. Legal and Contractual Issues

The Office requires a contractual agreement that fairly represents the rights and obligations of all parties to the contract. The following questions and statements are intended to elicit several key contract issues. Therefore, all of the questions in this part must be answered completely for the Vendor's proposal to be considered by *The Office*. If a Vendor has included copies of proposed sample contracts, the Vendor must identify the page and section of the contract that is responsive to each of the following questions and statements.

1. Terms of Payment

When will Vendor require the price for the system to be paid? Explain completely, including any payment schedules and alternatives.

Will the agreement include provisions imposing interest or finance charges on late payments by user? If so, how will billing disputes be handled? Please explain.

2. Delivery

The agreement shall include a binding delivery schedule consistent with the terms of this proposal request.

Specify the method of delivery and installation. Explain, indicating the party or parties responsible for performing and/or paying for each step involved.

Vendor must warrant that all equipment purchased under this proposal is free and clear of all liens.

3. Acceptance

All items purchased under this proposed request will be accepted only when all terms and any contracts arising from the proposal are met and the system is fully operational and in use by *The Office*. Specify, if any, the specific acceptance criteria the Vendor may have.

4. Assignment, Use and Resale

Will the agreement or any related maintenance agreement include any restrictions on assignment of the agreement (I) by the user, and (II) by the Vendor? Explain.

Will the agreement or any related maintenance agreement include any restrictions on the unconditional use by the user of the software? Explain, including any applicable reference to restrictions, lease and resale.

5. Termination

Under what circumstances, if any, can the user or Vendor terminate the agreement? Explain, including any penalties.

6. Execution Authority and Legal Assistance

Specify by name and title the individual or individuals within the Vendor's organization that presently have legal corporate authority to execute the agreement and any related agreements (including any amendments) on behalf of the Vendor.

7. Product Warranty

Complete product warranty information shall be submitted with the proposal. All manufacturers' warranties must be passed to *The Office*. Unless otherwise specified in the proposal, all equipment must be warranted as new and unused.

IV. PROPOSAL REQUIREMENTS

A. Hardware

Review

B. Software

22,000 Number of parcels

7 Employee stations

2 Public access stations

2 Laptops

1 Vendor station

Substantial number of images maintained (pdf. and jpeg.)

Database application costs of client/server for appraisal system.

All proposals should include cost of the license and unit cost of next license agreement.

C. Training

All proposals must include sufficient training to insure a successful installation. The proposal must specify the number of training days, the location and cost of each training session. Each training session may include a portion of or all staff members.

D. Installation and Conversion

The Vendor should specify the amount of time required for the installation and conversion process. Responsibilities of *The Office* must be specified for *The Office* for assistance in installation, cabling, database conversion and training. Vendor should identify all the historical data, attachments, images and sketches that will be converted or saved. *The Office* currently has infinite owner transfer history, deed reference, property note detail and appraisal detail history from 2006 forward.

E. Software/Hardware Maintenance

The Office will require a written software maintenance agreement for an agreed upon period of time. Any additional documentation that will assist *The Office* in evaluating the maintenance agreement should be included. Should Hardware be needed, please provide a separate document for hardware maintenance costs.

F. GIS Mapping System

A critical element in the implementation of a total solution package is the communication of data between the proposed system and a GIS Mapping System. The chosen Vendor must be able to demonstrate the ability to transfer files and integrate data with the GIS System. The Vendor must provide customer sites that are currently utilizing the interface. Failure to respond to this item may be grounds for elimination of the proposal.