



***HARRIS COUNTY
APPRAISAL DISTRICT
Harris County
Houston, Texas***

***BID DOCUMENTS
BID NUMBER 2016-12***

***COMMERCIAL VEHICLE VALUATION AND
REGISTRATION DATA***

FOR THE

***HARRIS COUNTY APPRAISAL DISTRICT
13013 NORTHWEST FREEWAY
HOUSTON, TEXAS 77040***

Issued: October 19, 2016

SCOPE & INTENT

I. INVITATION

The district is requesting written bids for assistance in reviewing and extracting summaries of certain commercial vehicle registration data from the Texas Motor Vehicle Registration (MVR) master file as maintained by the Vehicle Titles and Registration Division of the Texas Department of Transportation. The purpose of this project is to identify and value business vehicles subject to ad valorem taxation by one or more of the taxing jurisdictions served by HCAD.

II. TERM OF CONTRACT

- a. The term of agreement shall commence on January 1, 2017 and shall cease on December 31, 2017, with two successive one-year renewal options if service is satisfactory and escalation does not exceed two percent (2%) per year.
- b. This agreement is subject to annual renewed fiscal funding. If the district fails to appropriate funds to provide for annual renewal, the district may cancel without termination charge provided that the successful bidder receives written notice at least 30 days prior to the effective date stating the lack of funds as the reason for termination.

III. SUBMISSION OF BID AND FORMAT

- a. Bid documents must be submitted in triplicate and physically received no later than **9:30 a.m. on Wednesday, November 23, 2016** in the Purchasing Office of the District. Bid documents may be mailed, but must be physically received in the Purchasing Office by the required date and time.

PHYSICAL ADDRESS

Attn: Tammy Argento
Purchasing Manager
Harris County Appraisal District
13013 Northwest Freeway
Houston, TX 77040-6305

Or

MAILING ADDRESS

Attn: Tammy Argento
Purchasing Manager
Harris County Appraisal District
P. O. Box 920975
Houston, TX 77292-0975
TArgento@HCAD.org

- b. The statement ***RFQ #2016-12 ENCLOSED*** must be indicated on all Bid envelopes.
- c. Any questions pertaining to this bid should be directed to Tammy Argento, Purchasing Manager (713) 957-7401.

- d. All bids are subject to the General Conditions and Requirements as stated in this document. The District reserves the right to reject any or all bids or accept the bid(s) deemed most advantageous to the District. The District reserves the right to terminate the contract should your company be acquired by or merged with another company during the contract term.
- e. The District was created pursuant to the provisions of Chapter 6 of the Texas Property Tax Code and the District's functions, authorities, and responsibilities are those prescribed therein for appraisal Districts.

**FAILURE TO COMPLY WITH THESE
CONDITIONS AND REQUIREMENTS
MAY RESULT IN BIDS
BEING DISQUALIFIED**

GENERAL CONDITIONS OF BID

I. BIDS

- a. All bids must contain a properly completed *Propose to Provide Certification form* (page 15 of 15 in this document) furnished by the Purchasing Office, with supporting material attached. Each bidder is requested to submit any further concessions or services that it may want to offer the District, and is invited to make any comments relating to further consideration in selecting a provider of commercial vehicle valuation and registration data for the District.
- b. All bids must be written in ink or by typewriter, inkjet printer, or laser printer. Pencil quotations will not be considered. Bids must be filed in triplicate and all copies must be manually signed.
- c. Bids should show net prices, extensions and net total. In case of conflict between unit prices and extension, the unit price will govern.
- d. All bids are to be based on an as-delivered basis and must include all costs that will be billed (i.e. freight, inside delivery, messenger, handling, trip charges, etc.).
- e. Bidders shall furnish technical specifications and all data pertinent to warranties or guarantees that apply to items and/or services in the bid.
- f. This bid must not be altered. Any erasure or alteration of inquiries may invalidate the bid on the item on which the erasure or alteration is made.
- g. Quotations will not be considered in cases where bidder quotes more than one price on an item or services, except where alternate bids are expressly called for.
- h. All variances from the District's conditions and/or requirements, no matter how slight, must be indicated in the bid. Otherwise, it will be assumed that your bid fully complies with the District's conditions and requirements as defined in this document.
- i. Withdrawing a bid is permissible if such request is received, from the bidder, by the Purchasing Office prior to the bid opening date and time. All such requests must be typewritten or in ink, manually signed in ink by a responsible officer or employee of the firm, and title of the officer or employee must be shown.
- j. All bids must show the full name of firm proposing, with the name printed in ink.
- k. All bids must be signed, in ink, by a responsible officer or employee of the firm and title of the officer or employee must be shown. Obligations assumed by the signature must be fulfilled.

- l. Any deviation from the conditions and requirements of this bid must be disclosed and approved by the District.
- m. This request for bids does not commit the District to enter into any formal or informal contract, or to incur any costs related to the preparation of a response. All costs for preparation and submission of bids are the responsibility of the bidder.

II. PRICING

- a. No change in price will be considered in the award of bid, and all quotations must be on a net basis.
- b. Cash discounts will not be considered in the award of bid, and all quotations must be on a net basis.
- c. All prices bid must be firm for the term of agreement.
- d. All bids must include all costs that will be billed.

III. TAXES

- a. The District is exempt from the Federal Excise and Transportation Tax, and the limited Sales and Use Tax.
- b. Unless the bid form or requirements specifically indicate otherwise, the price proposed must be net exclusive of above mentioned taxes, and will be so construed.

IV. BIDDER QUALIFICATIONS & EVALUATION

- a. Bidders are required to submit a properly completed Bidder Application Form to the District's Purchasing Office. It is the responsibility of the bidder to inform the District's Purchasing Office of any changes/deletions/additions to this form as is deemed appropriate. This application is used to maintain a bidder database for the purpose of a bid mailing list, and other references as required. Bidders are only required to submit this form one time. Please contact the District's Purchasing Office at (713) 957-5214 if you are unsure as to whether this form has been previously submitted.
- b. Bidders are required to submit a biographical or historical sketch of their firm that must show past performance indicating the ability to perform the services being bid. As necessary criteria for any bidder, the District requires a showing of responsible performance in previous undertakings of similar nature and/or related projects for a period of five (5) years. Due to critical legal and practical issues, a record of satisfactory past performance will be required to be met, for a bidder to be a recipient of a contract award.

- c. The District may require bidder to demonstrate any item or service in their bid, and at their expense, before award of contract. It is mandatory that all bidders certify without reservation that their equipment will be compatible with District equipment, without additional cost to the District or without modification to existing District equipment.
- d. The District reserves the right to reject any bid at any time after the closing date and to conduct negotiations to the extent the District deems necessary and appropriate. However, bids should be submitted on the most favorable basis as to price, delivery, or time of completion and other factors since the District may elect to make an award without any further discussions or negotiations.

V. AWARD

- a. All bids will be evaluated using the same requirements and criteria.
- b. No firm having, or having had a contract with the District will be given more consideration than any other bidder.
- c. During any part of the bid process, from preparation of request for bid through the issuance of an agreement, the District purchasing office reserves the right to seek any additional information, clarification, and/or verification deemed necessary to render a reasonable responsive evaluation, and recommendation to the District's Board of Directors.
- d. Evaluation will determine the ability of the bidder to provide the most efficient service in the most economical method for the District. Other criteria will include pricing in all respects, quality of service, availability of service, and meeting of all requirements.
- e. The District will evaluate and make award of bids on the basis of the lowest and best bid that meets or exceeds the requirements.
- f. The District reserves the right to consider and make award of bids on items and/or services of similar nature that will in all respects serve the purpose for which the purchase is being made. The District reserves the right to be the sole judge as to whether such items and/or services will serve the purpose.
- g. The District reserves the right to consider and make awards for the best interests of the District.
- h. The District reserves the right to accept in whole or in part any bid or bids submitted that offer the most favorable terms and conditions for providing the commercial vehicle valuation and registration data services to the District, to reject any or all bid or bids in whole or in part, or to waive any informalities for the best interests of the District.

- i. Contents of the selected bid(s) and all conditions and requirements of the request for bid are contractual obligations.
- j. The District may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the bidder's best terms.
- k. Bidders with delinquent property taxes will not be considered for award.
- l. A purchase order will be issued to the successful bidder(s) upon award of the bid.
- m. Upon awarding the contract, a tabulation of bids will be available for public inspection in the Purchasing Office. To schedule a time to view such record(s) call (713) 957-7401.

VI. DEPOSIT & PERFORMANCE BOND

No deposit or bond is required.

VII. SUPPLEMENTAL AGREEMENTS

Should the bidders take exception to District's terms and conditions and/or require that supplemental vendor agreements be signed by the District in order to enter into this contract, such agreements must be included with the bid response and are subject to review and amendment by the District's counsel and under the laws of the State of Texas prior to being executed by the District. All supplemental agreements must include fiscal funding out clauses.

VIII. DELIVERIES

- a. All bids are for delivery not later than the time stated in the requirements, F.O.B. the point of delivery stated in the requirements.
- b. It is the responsibility of all bidders to keep the District's Purchasing Office notified of any unexpected problems that would prevent the bidder from meeting delivery deadlines, as they become aware of them.
- c. The District reserves the right to reject, without prior authorization, any deliveries not meeting these requirements.

IX. REJECTIONS

Items and/or services not in accordance with samples and requirements shall be modified to reach conformity, by the bidder and at his expense. All disputes concerning quality of deliverables under this bid will be determined by the purchasing agent or his designated representative.

X. PAYMENT

- a. Payment will be made on completed purchases that are cleared by the last working day of the month.
- b. Partial payments will be made on purchase orders. However, contact must be made with the assistant chief finance officer before the end of the month that the bidder wishes to receive payment on items and/or services delivered. Otherwise, payment will be made on completion of the purchase order.
- c. Payments (complete or partial) will be mailed no later than the fourth Friday of the following month.
- d. The District's obligations will be payable solely from funds appropriated in the District's budget for the year in which such obligations may be due and payable. In the event that no funds or insufficient funds are appropriated for payment of obligations the contract shall be terminated without liability to the District, its officers, agents, or employees.
- e. All invoices must reference **RFP #2016-12**, and the applicable purchase order number.
- f. All invoices should be submitted to the following address:

Attn: Accounts Payable
Harris County Appraisal District
P. O. Box 920975
Houston, TX 77292-0975
Or
Email to AccountsPayable@HCAD.org

XI. PATENTS & COPYRIGHTS

- a. The contractor agrees to indemnify and save harmless the District, its officers and employees, from all suits and actions of every nature and description brought against them or any of them, for or on account of the use of patented or copyrighted appliances, products, processes, and/or services, and he shall pay royalties and charges which are legal and equitable.
- b. Evidence of such payment or satisfaction shall be submitted, upon request of the Purchasing Office, as necessary requirement in connection with the final estimate for payment in which such patented or copyrighted appliances, products, processes, and/or services are used.

XII. CANCELLATION

- a. Cancellation of the agreement by the bidder must be submitted in writing to the District's Purchasing Office 120 calendar days prior to the effective date.
- b. Cancellation of the agreement by the District must be submitted in writing to the bidder 60 calendar days prior to the effective date.

XIII. SEVERABILITY

If any section, subsection, paragraph, sentence, phrase, or work in this request for bid shall be held invalid, such holding shall not affect the remaining portions of this request for bid and it is hereby declared that such remaining portions would have been included in this request for bid as though the invalid portion had been omitted.

XIV. CONDITIONS PART OF BID

The General Conditions of Bid defined herein shall be a part of the attached bid.

REQUIREMENTS OF BID

1. TASK IDENTIFICATION

Identify and estimate the market value of licensed vehicles (automobiles, trucks, trailers, motor homes and travel trailers) which are used or held for the production of income in Harris County as of January 1. A vehicle is considered to be used in the production of income if one or more of the following conditions exists:

- a. The vehicle is available for lease or rent.
- b. The vehicle is being capitalized for income tax purposes.
- c. The vehicle is registered in the name of a business organization.

The information supplied should be based on the Texas Motor Vehicle Registration (MVR) master file, as maintained by the Vehicle Titles and Registration Division of the Texas Department of Transportation, and should support assessment of business vehicles taxable in the HCAD areas of responsibility as of January 1st. Any methodology used in this project must be consistent with the statutes and rules as set forth in the Texas Property Tax Code, and be consistent with generally accepted appraisal practices.

2. DESCRIPTION, LOCATION AND OWNERSHIP INFORMATION REQUIREMENTS

- a. Vehicle Owner's Name, Address and Zip Code
- b. Vehicle Identification Number (VIN)
- c. Make, Model and Year of Manufacture of Vehicle
- d. Gross Vehicle Weight in Tons for Trucks
- e. Title Number and Date of Issue
- f. Current and Previous License Numbers
- g. County Identification Code
- h. State Registration Class Code

3. VALUATION INFORMATION

An average value as of January 1st of the subject tax year must be provided for each vehicle identified as a business-use asset. These values must be based on a recognized valuation

source or sources. These specific sources are stipulated as the value sources for the following vehicles:

- a. For passenger vehicles and light trucks, the Price Digest trade-in value if this value is available for the subject vehicle.
- b. For large trucks, the Price Digest trade-in value if this value is available for the subject truck.

For other classes, or for cases in which the above values are not available, other defensible sources of value must be provided for each vehicle identified as a business use asset. Valuation of newest model year vehicles not yet listed in the various guides should be based on an percentage of M.S.R.P. that reasonably represents the trade-in/wholesale level of valuation. The source of each vehicle value must be coded and the source codes must be provided to HCAD.

4. GEOGRAPHIC AREA OF CONCERN

The Appraisal District is responsible for the discovery and valuation of property in all of Harris County. A separate report should be prepared listing vehicles registered in other counties throughout the state with an owner's registration address within Harris County.

As a severable part of the Bid, the district is requesting a separate report be prepared listing all vehicles registered in counties adjacent to Harris County.

5. DISTRICT COMPUTER MEDIA FORMAT REQUIREMENTS

All data elements and information must be provided to HCAD on Compact Disc or Digital Video Disc (CD or DVD) conforming to the following specific requirements:

- a. Unlabeled
- b. Fixed Length Records
- c. ASCII

All records provided must conform to the required record description specified in Exhibit C (Page 14). No deviation from this format will be acceptable.

6. TEST DATA

The Bid should include the submission of sample deliverable product (test data) based on January 1, 2017 information. This system test data should be provided on CD or DVD.

Summary reports concerning the test data must accompany the Bid. Test data submission must include the requested information for the following:

- a. One leasing company from list on Exhibit A (Page 12)
- b. One auto rental company from Exhibit B (Page 13)
- c. One zip code from Harris County

7. DISTRICT QUALITY REVIEW

The district reserves the right to review in a reasonable manner the accuracy and completeness of the product returned pursuant to the terms of the Bid as accepted by the district board of directors.

8. DELIVERY DATES

The vendor must provide the commercial report to the district's data processing department by February 1st.

EXHIBIT A

LEASING COMPANIES

D. L. Peterson Trust

Ford Motor Credit Corporation

Enterprise Leasing

General Electric Capital Auto Lease (GECAL)

General Electric Capital Corporation (GELCO)

General Motors Acceptance Corporation(GMAC)

Mercedes Benz Credit Corporation

Toyota Motor Credit Corporation

Wheels, Inc.

EXHIBIT B

CAR RENTAL COMPANIES

Advantage Auto Rental Systems Inc.

Agency Rent-A-Car

Alamo Rent-A-Car Inc.

Avis Rent-A-Car Systems Inc.

Budget Rent-A-Car

Dollar Systems Inc.

The Hertz Corporation

National Car Rental System Inc.

Thrifty Rent-A-Car System Inc.

EXHIBIT C

REQUIRED VEHICLE DATA RECORD DESCRIPTION

No.	Description	Type	Length	Precision
1	Current License No.	alphanumeric	10	NA
2	Previous License No.	alphanumeric	10	NA
3	Vehicle Make	alphanumeric	4	NA
4	Vehicle Model Year	numeric	4	0
5	Vehicle ID (VIN)	alphanumeric	22	NA
6	Vehicle Model	alphanumeric	5	NA
7	Vehicle Model Style	alphanumeric	2	NA
8	Vehicle Description	alphanumeric	50	NA
9	Vehicle Tons	decimal	9	2
10	Vehicle Weight Empty	numeric	6	0
11	Vehicle Weight Gross	numeric	6	0
12	Vehicle Fuel Indicator	alpha	5	NA
13	Vehicle Class	alphanumeric	8	NA
14	Registered Class	numeric	2	0
15	Registration Date	date	10	NA
16	Registration Year	numeric	4	0
17	Registration Expiration Year	numeric	4	0
18	Registration Expiration Month	numeric	2	0
19	Vehicle Lease Flag	alphanumeric	1	NA
20	Vehicle Price	numeric	6	0
21	Vehicle Selected Value	numeric	12	0
22	Vehicle Source	alpha	2	NA
23	Vehicle Car or Truck	alpha	1	NA
24	Vehicle Foreign or Domestic	alpha	1	NA
25	Owner Name	alphanumeric	50	NA
26	Registrant Mail Address	alphanumeric	50	NA
27	Registrant City	alphanumeric	50	NA
28	Registrant State	alphanumeric	2	NA
29	Registrant Zip	alphanumeric	5	NA
30	Owner of Vehicle	alphanumeric	50	NA
31	Owner State	alphanumeric	2	NA
32	Bus Flag 1	numeric	1	0
33	Bus Flag 2	numeric	1	0
34	Previous Owner Name	alphanumeric	50	NA
35	Previous Owner City	alphanumeric	50	NA
36	Previous Owner State	alphanumeric	2	NA
37	Lienholder Name	alphanumeric	50	NA
38	Lienholder Address	alphanumeric	50	NA
39	Lienholder City	alphanumeric	50	NA
40	Lienholder State	alphanumeric	2	NA
41	Lienholder Zip	alphanumeric	4	NA
42	Lien Date	date	10	NA
43	Title Issue Date	numeric	8	0
44	Title Process Code	alphanumeric	2	NA
45	County of Registration	alphanumeric	3	NA
46	New or Used Indicator	alpha	1	NA
47	Vehicle Length	numeric	2	0

EXHIBIT D

PROPOSE TO PROVIDE CERTIFICATION FORM

I/WE HEREBY PROPOSE to provide the data entry and verification services proposed within this document and if awarded a portion or all of this bid, do agree to abide by the conditions and requirements herein, except as noted below under "EXCEPTIONS AND CONDITIONS OF THE BIDDER". Any deviation from the item requirements must be noted on the Bid sheet for that item referenced below.

EXCEPTIONS AND CONDITIONS OF THE BIDDER

Item requirement deviation notations appear on item numbers:

If none, so state. _____

NAME OF FIRM SUBMITTING BID *(Print or Type)*

STREET ADDRESS *(Print or Type)*

TELEPHONE NO.

CITY, STATE & ZIP CODE *(Print or Type)*

NAME & TITLE OF PERSON SUBMITTING BID *(Print or Type)*
(Officer of the Company or Authorized Sales Representative)

SIGNATURE OF PERSON SUBMITTING BID

SUBSCRIBED AND SWORN to before me this the _____ day of _____, 20__.

Notary Public,
State of _____