



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

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***BID DOCUMENTS  
BID NUMBER 2017-04***

***PROPERTY TRANSACTION INFORMATION***

***FOR THE***

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

*Issued: September 20, 2017*

## **SCOPE & INTENT**

### **I. INVITATION**

The Harris County Appraisal District (hereinafter referred to as District) is accepting sealed proposals, in triplicate, on a contract for the purchase of property transaction information as outlined in this document. The District desires to acquire the property transaction information in a manner that represents the best value to the District. The District considers value to be a function of price and quality.

### **II. TERM OF CONTRACT**

- a. The term of agreement shall commence on January 1, 2018, and shall cease on December 31, 2018, with two successive one-year renewal options if service is satisfactory and escalation does not exceed three percent (3%) per year. Offer to renew the agreement must be submitted in writing by the proposer to the District's Purchasing Office 90 calendar days prior to the effective date.
- 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, if 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 PROPOSAL AND FORMAT**

- a. Proposal documents must be submitted in triplicate and physically received no later than **10:00 a.m. on Wednesday, October 25, 2017** in the Purchasing Department on 2<sup>th</sup> floor. Proposal 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

#### **MAILING ADDRESS**

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

- b. The statement **RFP #2017-04 ENCLOSED** must be indicated on all proposal envelopes. If a proposal is not adequately identified, it will be opened to establish identification and will be processed as any other proposal. However, this results in an unsealed proposal and violates the integrity of purpose for the sealed procedure. Consequently, proposers are urged to make certain the envelope is adequately identified.
- c. Proposals not physically received in the Purchasing Office by the required date and time, as evidenced by the Purchasing Office date and time stamp, will be returned unopened provided

the proposer's envelope is properly identified with the return address. If the proposer's envelope is not properly identified it will be opened to identify the proposer and/or obtain the address before it is returned.

- d. All proposal documents timely received will be opened and read at 2:30 p.m. on Wednesday, October 25, 2017, in the Board of Directors conference room on the seventh floor of the HCAD building.
- e. Any general questions pertaining to this proposal should be directed to Tammy Argento, Purchasing Manager (713) 957-7401. Any technical questions pertaining to the requirements of this proposal should be directed to Bonnie Hebert, Information & Assistance Director at [BoHebert@hcad.org](mailto:BoHebert@hcad.org). All vendor questions will be posted with answers to the HCAD.org website within 24 hours.
- f. All proposals are subject to the General Conditions and Requirements as stated in this document. Additionally, all proposals, and any contracts that may be commissioned, based upon the proposals, are subject to the requirements of Section 25.01 of the Texas Property Tax Code, as applicable. The District reserves the right to reject any or all proposals or accept the proposal(s) deemed most advantageous to the District. A contract will be awarded subject to the approval of the District Board of Directors. The District reserves the right to terminate the contract should your company be acquired by or merged with another company during the contract term.
- g. 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 PROPOSAL  
BEING DISQUALIFIED**

# GENERAL CONDITIONS OF PROPOSAL

## I. PROPOSALS

- a. All proposals must contain a properly completed *Propose to Provide Certification form* (page 14 of 14 in this document) furnished by the Purchasing Office, with supporting material attached. Each proposer 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 property transaction information for the District.
- b. All proposals must be written in ink or by typewriter. Pencil quotations will not be considered. Proposals must be filed in triplicate and all three copies must be manually signed.
- c. Proposals should show net prices, extensions and net total. In case of conflict between unit prices and extension, the unit price will govern.
- d. All proposals 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. Vendor shall furnish technical specifications and all data pertinent to warranties or guarantees that apply to items and/or services in the proposal.
- f. This proposal must not be altered. Any erasure or alteration of inquiries may invalidate the proposal on the item on which the erasure or alteration is made.
- g. Quotations will not be considered in cases where proposer quotes more than one price on an item or services, except where alternate proposals are expressly called for.
- h. All variances from the District's conditions and/or requirements, no matter how slight, must be indicated in the proposal. Otherwise it will be assumed that your proposal fully complies with the District's conditions and requirements as defined in this document.
- i. Withdrawing a proposal is permissible if such request is received, from the proposer, by the Purchasing Office prior to the proposal 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 proposals must show the full name of firm proposing, with the name printed in ink.
- k. All proposals 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. All proposals must be notarized by a bonded notary public.

- m. Any deviation from the conditions and requirements of this proposal must be approved in writing by the District.
- n. A narrative statement of proposed procedures for implementation of the agreement with a January 1, 2018 commencement date must be included with each proposal.
- p. Proposers are invited to be present at the opening of proposals.
- q. This request for proposal does not commit the District to enter into any formal or informal property transaction information arrangement, or to incur any costs related to the preparation of a response. All cost for preparation and submission of proposals is the responsibility of the proposer.

## **II. PRICING**

- a. No change in price will be considered in the award of proposals, and all quotations must be on a net basis.
- b. Cash discounts will not be considered in the award of proposals, and all quotations must be on a net basis.
- c. All prices proposed must be firm for the term of agreement.
- d. All proposals 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 proposal form or requirements specifically indicate otherwise, the price proposed must be net exclusive of above mentioned taxes, and will be so construed.

## **IV. PROPOSER QUALIFICATIONS & EVALUATION**

- a. Proposers 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. Proposers 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 proposed. As a necessary criterion for any vendor, 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 vendor to be a recipient of a contract award.
- c. The District may require proposers to demonstrate any item or service in their proposal, and at their expense, before award of contract. It is mandatory that all proposers 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 proposal at any time after the closing date and to conduct negotiations to the extent the District deems necessary and appropriate. However, proposals 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 proposals 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 proposer.
- c. During any part of the proposal process, from preparation of request for proposal 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 proposer 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 reserves the right to consider and make award of proposals 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.
- f. The District reserves the right to consider and make awards for the best interests of the District.
- g. The District reserves the right to accept in whole or in part any proposal or proposals submitted that offer the most favorable terms and conditions for providing the property

transaction information to the District, to reject any or all proposal or proposals in whole or in part, or to waive any informalities for the best interests of the District.

- h. Contents of the selected proposal(s) and all conditions and requirements of the request for proposal are contractual obligations.
- i. Proposals are customarily referred to the using department for recommendations. Wherever possible, such recommendation will be made in time to permit the District Board of Directors to award a contract at its next scheduled meeting on Wednesday, November 15, 2017 at 9:30 a.m.
- j. The District may award a contract based on initial offers received, without discussions. Therefore, each initial offer should contain the proposer's best terms.
- k. Bidders having delinquent property taxes will not be considered for award.
- l. A purchase order will be issued to the successful proposer(s) upon award of the proposal.
- m. Upon awarding the contract, a tabulation of proposals will be available for public inspection on <http://www.HCAD.org> in the ABOUT menu under Procurement. You may also make a request by email to: TArgento@hcad.org.

## **VI. SUPPLEMENTAL AGREEMENTS**

Should the proposer 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 proposal 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.

## **VII. 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 Financial Officer before the end of the month that the vendor 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 #2017-04**, 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

### **VIII. 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.

### **IX. CANCELLATION**

- a. Cancellation of the agreement by the proposer 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 proposer 60 calendar days prior to the effective date.

### **X. SEVERABILITY**

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

### **XI. CONDITIONS PART OF PROPOSAL**

The General Conditions of Proposal defined herein shall be a part of the attached proposal.



# REQUIREMENTS OF PROPOSAL

## **I. PROPERTY TRANSACTION REPORTS**

- a. Proposer shall provide a daily report listing all property ownership transactions filed with the Harris County Clerk that apply to property within the boundaries of the District, except as noted below. The report shall be provided in electronic format, except as specified in *items g and h* below.
- b. An electronic report is to be generated for each day on which one or more property ownership transaction documents are filed with the County Clerk.
- c. Reports must be delivered to the District each regular business day, no later than (30) - thirty working days after the transaction filing date.
- d. Reports are not to include deeds of trust; oil, gas or mineral deeds; or quitclaim deeds.
- e. Each transaction is only to be listed (1) one time, regardless of the number of grantors or grantees unless the property involved in the transaction crosses subdivision boundaries. The transaction would then be listed under each subdivision name. Both of the spouses' names must be listed on the report if both names are on the deed.
- f. All transaction reports, copies of deeds, and ownership indices provided to the District under this proposal are subject to public disclosure in the manner provided by Texas law. At a minimum, the District must be able to provide any information provided to it under this proposal, with the exception of information related to property sales prices, in hard copy form to any person who requests it pursuant to the Texas Open Records Act. The District must be able to provide information related to property sales prices, at a minimum, in hard copy, to:
  - the owner of the sold property or his/her agent;
  - the owner or agent of any property that was appraised using the information; and
  - members of the appraisal review board determining a protest to which the information is relevant.
- g. Proposer shall identify those properties requiring account maintenance by the District (split-outs and full or partial governmental takings) on a hard copy report. These would include transactions where the acreage or legal description on the deed does not match the acreage or legal description listed on the District's corresponding account, or where the parcels included on the deed cover only a portion of the parcels (lots) listed on the District's account. A copy of the deed must be provided.
- h. Transactions from correction deeds are to be provided on a hard copy report.
- i. Proposer shall identify any Harris County orders that include annexations and/or redefining jurisdictional boundaries and provide the documentation.

- j. Proposer shall provide a single copy of the hard copy report. The hard copy report must be double spaced between each transaction listing, with a minimum of (5) five transactions per page and must be printed on 8-1/2" wide x 11" high bond paper. Subdivision, abstract properties, and correction deeds shall be listed separately as follows:
- subdivision list in alphabetical order of subdivision name, ascending numeric section, ascending lot and block order.
  - abstract list in ascending deed (file) number order.
  - list of correction deeds filed
- k. Proposer shall attach to each hard copy report an 8-1/2" wide x 11" high hard copy of each deed (on bonded paper - negative print) for all properties located in abstracts or reserves, and all properties needing to be split-out.
- l. Hard copy reports shall provide the information listed in Exhibit 1 and Exhibit 2, and be formatted as shown in Exhibit 1 and Exhibit 2.

## **II. ON-LINE ACCESS TO REAL PROPERTY RECORDS**

Proposer shall provide up to 1,000 document images per month at no additional charge. Document images will be e-mailed to the District.

## **III. DIRECT ACCESS TO VIEW OR COPY ACTUAL DEEDS**

- a. Proposer shall provide access to view and/or copy actual deeds of Harris County electronically. Proposer must agree to maintain the copies in a form that will allow for immediate access during normal business hours.
- b. Proposer shall provide an alternate means of access whereby authorized District employees may request copies of deeds that are not available electronically, using either proposer's on-line system or District's e-mail system, and receive electronic images in return.
- c. Proposer shall include pricing under which the District provides an employee to handle deed requests, and under which proposer's employees handle deed requests.

## **REQUIREMENTS OF PROPOSAL**

### **IV. OTHER REPORTS AND SUBSCRIPTIONS**

Proposers should offer the following information in electronic form:

- a. Information provided on at least a weekly basis and delivered to the District no later than (30) thirty working days after the transaction filing date of commercial sales transactions, listing for each transaction

1. The type of transaction;
2. The District's 13-digit account number for each parcel involved;
3. The legal description of the property;
4. The names, addresses, telephone numbers of the parties
5. The sale price or amount of the transaction; and
6. The date of the transaction;
7. If the transaction involved transfer of a portion of a District parcel, data describing the metes and bounds of the transferred portion in a format that can be read by the District's GIS system. Each transaction shall be accompanied by a copy of the deed and deed of trust which includes the cover page, the signature page, the legal descriptions, the names and addresses of the parties to the transaction, and the consideration for the transaction.

- b. Sales information provided in Excel spreadsheet on at least a monthly basis made available to the District via FTP site, no later than the 5<sup>th</sup> day of the following month of the transaction date for each sale, i.e. (we need all of the June sales before July 5). Include in the monthly sales information any omitted sales from the previous month's sales file. Examples of property types are single-family, vacant lots, multi-family, condos, townhouses etc. Each file shall contain similar fields and unique fields for the property type, the unique fields for each property type is an item to be negotiated at a later date. The requested fields are as follows:

1. The District's 13-digit account number
2. Legal description
3. List price
4. Street and street number
5. Square footage of building
6. Year built
7. Real remarks
8. Other remarks
9. Defects disclosures
10. Exclusions
11. Days on market
12. Sales price
13. Sold terms
14. Points discount

15. Closed date
16. Loan amount new
17. Loan interest rate new
18. Amortized years
19. Points seller
20. Closing costs
21. Repair seller
22. Subdivision
23. County
24. Grantor and Grantee names and addresses
25. Agent Seller
26. Selling Agent Name
27. Selling Office Name
28. Listing Agent
29. Listing Agent Name
30. Listing Office Name
31. Seller Agent Email
32. Seller Agent Office Phone No.
33. MLS Condo/Townhouse Unit No.
34. CAD Building No.
35. CAD Unit No.
36. HOA Dues

- c. Information equivalent to that contained in "PropertyInfo's CD - Landmap or equivalent."
- d. A street-level image of the property either "For Sale" or "Sold".

## ***EXHIBIT 1***

ABSTRACT DEED REPORT - printed in Deed # order

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District Account Number(s)	Type of Deed	File Date	Instrument Date
Abstract # & Name	Tract Name	Sales Price	Deed # (file #)
Grantee's Name	*Acreage or Sq. Footage		Grantor's Name
Mailing Address	Acreage or Sq. Footage of any save & except.		
City, State, Zip Code			

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\*If more than one (1) tract is included in the deed, list each tract name and its acreage separately, as well as, any save & except acreage.

## ***EXHIBIT 2***

SUBDIVISION EXCEPTION REPORT - printed in alphabetical order of subdivision name, ascending section number, ascending lot and block order.

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District Account Number(s)	Type of Deed	File Date	Instrument Date
Subdivision Name & Sec.	Lot & Block	Sales Price	Deed # (file #)
Grantee's Name	Acreage or Sq. Footage		Grantor's Name
Mailing Address			
City, State, Zip Code			

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**PROPOSE TO PROVIDE CERTIFICATION FORM**

I/WE HEREBY PROPOSE to provide the property transaction reports and on-line access to current and prior year ownership information proposed within this document and if awarded a portion or all of this proposal, do agree to abide by the conditions and requirements herein, except as noted below under "EXCEPTIONS AND CONDITIONS OF THE PROPOSER". Any deviation from the item requirements must be noted on the proposal sheet for that item referenced below.

**EXCEPTIONS AND CONDITIONS OF THE PROPOSER**

Item specification deviation notations appear on proposal item numbers:  
If none, so state.

\_\_\_\_\_  
**NAME OF FIRM SUBMITTING PROPOSAL** *(Print or Type)*

\_\_\_\_\_  
**STREET ADDRESS** *(Print or Type)*

\_\_\_\_\_  
**TELEPHONE NO.**

\_\_\_\_\_  
**FAX NO.**

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

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

\_\_\_\_\_  
**SIGNATURE OF PERSON SUBMITTING PROPOSAL**

**SUBSCRIBED AND SWORN to before me this the \_\_\_\_\_ day of \_\_\_\_\_, 2017.**

\_\_\_\_\_  
**Notary Public,**  
**State of \_\_\_\_\_**