



**TRAVIS CENTRAL APPRAISAL DISTRICT
2024-02: REQUEST FOR QUALIFICATIONS FOR
LAND VALUATION SERVICES**

PROPOSAL DUE DATE: Wednesday, September 25, 2024 at 2:00 p.m. (CST)

ISSUED BY: TRAVIS CENTRAL APPRAISAL DISTRICT- FINANCE DEPARTMENT

Travis Central Appraisal District is accepting qualification statements for the following project:

The Travis Central Appraisal District is accepting sealed qualification statements until 2:00 p.m., September 25, 2024, for land valuation services in Travis County.

A copy of the RFQ package, including the scope of work, is available in its entirety on the Travis Central Appraisal District website at <https://traviscad.org/publicinformation>.

Responses shall be mailed or hand-delivered in a sealed envelope marked on the outside “**2024-02: RFQ for Land Valuation Services - DO NOT OPEN**” prior to 2:00 p.m. on Wednesday, September 25, 2024.

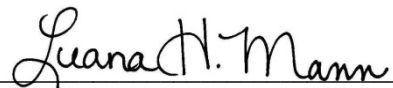
Responses can be mailed to:

Travis Central Appraisal District
ATTN: Finance Department
P.O. Box 149012
Austin, Texas 78714-9012

Responses can be hand delivered to:

Travis Central Appraisal District
ATTN: Finance Department
850 E. Anderson Lane
Austin, Texas 78752

TCAD reserves the right to reject any or all qualification statements, to waive technicalities or formalities, and to accept the response that the District determines to be most qualified. The District may also decide to take no action and reserves the right to do so. Qualification statements submitted after the deadline will not be accepted.



Leana Mann, RPA, CCA, CGFO
Chief Appraiser
Travis Central Appraisal District

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Section 1: General Information & Requirements

1.1 General Information

The Travis Central Appraisal District is seeking qualified companies (“Contractor”) to submit proposal responses for land valuation services (“Project”).

This Request for Qualifications (RFQ) contains information and instructions to enable interested proposers to prepare and submit a proposal and describes the terms and conditions that the successful Contractor will be expected to accept as part of the performance of the Contract. Below is the anticipated project schedule:

Event	Date
RFQ Open	August 27, 2024
RFQ Close	September 25, 2024, at 2:00 PM
Board of Directors Approval	October Board Meeting, Date TBD
Contract Negotiations	October 2024
Data Transfer of Final Land Tables & Values	December 31, 2024

1.2 Public Information

All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (*Texas Government Code*, Chapter 552.001, *et. seq.*) after the solicitation is completed. The District strictly complies with all statutes, court decisions, and opinions of the Texas Attorney General with respect to disclosure of RFP and/or RFQ information.

1.3 Clarifications and Interpretations

Any clarifications or interpretations of this RFQ that materially affect or change its requirements will be posted on the District’s website at <https://traviscad.org/publicinformation>. It is the responsibility of the respondents to obtain this information. All addenda issued by the District prior to the proposal due date are considered to be incorporated herein by reference. The deadline for the District to issue addenda statements is Friday, September 13, 2024. Interpretations or clarifications in any other form, including oral statements, will not be binding on the District and should not be relied upon in preparing proposals. Award information will be issued by the Travis Central Appraisal District via email directly to the qualified respondent. A courtesy e-mail will be sent to all other respondents who are not selected.

1.4 Proposal Submission

All proposals must be received **at the address specified prior to the deadline**. The District will not consider any response to this solicitation that is not received at the address specified by the deadline.

DEADLINE AND LOCATION: The District will receive proposals up to the time and date at the location described below:

Wednesday, September 25, 2024, at 2:00 p.m.

Mail to:

Travis Central Appraisal District
ATTN: Finance Department
P.O. Box 149012
Austin, TX 78714-9012

Hand Deliver to:

Travis Central Appraisal District
ATTN: Finance Department
850 E. Anderson Lane
Austin, Texas 78752

Responses shall be mailed or hand-delivered in a sealed envelope marked on the outside “**2024-02: Land Valuation Services - DO NOT OPEN**”. A contact name, return address, and e-mail address for the respondent's contact person must be included. Respondents should submit three (3) identical copies of the qualifications.

1.5 Point of Contact

The District designates the following person as its representative and point of contact for this RFQ. Respondents shall restrict all contact with the District and direct all questions regarding this RFQ, including questions regarding terms and conditions and technical specifications, to the point-of-contact person:

Leana Mann, Chief Appraiser
PO Box 149012
Austin, TX 78714-9012
(512) 834-9317 Ext. 405
Lmann@tcadcentral.org

All questions and requests for clarifications must be received by 2:00 p.m., Friday, September 13, 2024.

1.6 General Terms, Conditions & Requirements for Solicitations

This Request for Proposal shall be governed by the following documents unless an exception is otherwise taken within this Solicitation.

- Chapter 252, Local Government Code (reference only)
- Chapter 2254, Government Code (reference only)
- Travis Central Appraisal District Finance Policy (reference only)
- General Terms and Conditions (reference only)

1.7 District's Reservation of Rights

The District may evaluate the qualification statements based on the successful completion of all required materials related to the RFQ. The District reserves the right to divide the project into multiple parts, to reject any and all qualifications and re-solicit for new qualifications, or to reject any and all submissions and temporarily or permanently abandon the Project. The District makes no representations, written or oral, that it will enter into any form of agreement with any respondent to this RFQ for any project, and no such representation is intended or should be construed by the issuance of this RFQ.

1.8 Reimbursement of Cost

Respondents acknowledge and accept that any costs incurred from the respondent's participation in this RFQ shall be at the sole risk and responsibility of the respondent.

1.9 Eligible Respondents

Only individuals, companies, or lawfully formed business organizations may apply. This does not preclude a respondent from using consultants. The District will contact only the individual firm or formal organization that submits a proposal.

1.10 Prohibition on Contracts with Companies Boycotting Israel

Respondents are advised that Texas Government Code, Section 2270.002 prohibits a governmental entity from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

Section 2: Summary Information

2.1 Historical Background

The Travis Central Appraisal District was created under the 66th Texas State Legislature in 1979 under the provisions of Senate Bill 621, known as the Property Tax Code. The District is responsible for the appraisal of property subject to ad valorem taxation in Travis County, Texas. The District is governed by a board of nine directors serving four-year terms, including three locally elected board members.

The District was formed in 1981 and formally began operations in 1982, pursuing its mission to provide accurate appraisals of all property in Travis County at one hundred percent of market value, equally and uniformly, in a professional, ethical, economical, and courteous manner, working to ensure that each taxpayer pays only their fair share of the property tax burden. As stipulated under the Texas Property Tax Code, the District serves the citizens and taxpayers of Travis County and the taxing entities that lie within Travis County.

2.2 Project Description and Scope

Accurate land valuation is a critical component of a mass appraisal system. In recent years, the appraisal district has experienced challenges with land valuation processes due to limited personnel resources and a lack of sales disclosure. The District is exploring contractors that can provide land valuation services for all land within Travis County using AI or machine learning valuation models.

The provided solution must use, at a minimum, five (5) AI or machine learning valuation models. Within the models used, one (1) must use multiple regression analysis (MRA). Model(s) should consider location-specific influences and use multiple data sources. The solution must then combine all model data into land tables for each geographic market area and provide a land value for each parcel in Travis County.

All data sources shall be comprehensive and provide reliable and accurate information. All data sources shall be openly communicated with the CAD and be fully transparent. All data will be subject to the Public Information Act. Data should be obtained from multiple, diverse data sources, and employ a quality assurance process to ensure the data is reliable.

The solution should also provide GIS parcel data in a shapefile that contains:

1. Parcel-specific information such as shape and size
2. Topography and elevation
3. Location within TCAD specific market areas
4. Adjacency to water bodies or green spaces
5. Street frontage and access

The final solution shall be delivered in three different ways:

1. Land tables and schedules for each specific TCAD market area
2. Per parcel land value
3. Shapefile (required); Web-based visualization tool (preferred)

2.3 Project Schedule

Event	Date
RFQ Released	8/27/2024
RFQ Clarification Request Deadline	9/11/2024
RFQ Addenda Deadline	9/13/2024
RFQ Submittal Deadline	9/25/2024
Board of Directors selects the most qualified respondent	October Board Meeting (TBD)
Contract negotiations	October
Agreement Execution	No later than 10/31/2024
Final Deliverables due to TCAD	12/31/2024

Other project deadlines and schedule details will be discussed and outlined in the contract agreement.

2.4 General Conditions

All respondents shall agree to the following conditions:

- A. The original proposal and two (2) copies shall be delivered in a sealed envelope marked “**2024-02: RFQ for Land Valuation Services - DO NOT OPEN**” on or before 2:00 p.m., Wednesday, September 25, 2024, to Travis Central Appraisal District, ATTN: Finance Department. Requests for an extension of the closing date or time will not be granted. Only proposals with the required documentation will be considered. Proposals arriving late will not be considered. Proposers should allow sufficient mailing or transportation time to ensure the timely receipt of the proposal.
- B. All proposals, attachments to, and/or documents submitted with a proposal must be signed by an individual who is authorized to act on behalf of the proposer.
- C. Respondents agree by submission of their proposal that they have reviewed the RFQ documents and instructions and accept the requirements.
- D. Each proposal shall be prepared in a simple manner and provide a straightforward, concise delineation of the responder’s ability to satisfy the requirements of the RFQ.
- E. Respondents desiring to submit proposals in response to this request must comply with all mandatory submission requirements set out in this document. Failure to comply with any part of the request may subject the response to immediate rejection.
- F. Any inquiries from parties concerning this RFQ and its requirements shall be submitted in writing (e-mail is acceptable) to: Leana Mann, Travis Central Appraisal District, P.O. Box 149012, Austin, Texas 78714-9012 or at Lmann@tcadcentral.org.
- G. No negotiations, decisions, or actions shall be initiated or executed by the proposer as a result of any decision with a TCAD employee. Only those communications that are in writing from TCAD shall be considered as a duly authorized expression of TCAD.
- H. Proposer agrees to abide by the Prevailing Wage Standard in the cost of his/her proposal.

2.5 Competitive Selection

The method to be used in selection is detailed in Texas Local Government Code, Chapter 252 and Texas Government Code 2254.

- This is a negotiated procurement.
- In making the determination, the District shall consider the Proposer’s technical expertise and experience, the proposer’s references and record of responsibility, and any other relevant factor that the District deems necessary.
- The District reserves the right to retain all Proposal responses for a period of forty-five (45) days after the opening date for examination and comparison.

2.6 Criteria Used for Selection

Proposals will be evaluated based on the following criteria:

Criteria	Weighted Value
Methodology	40
Experiences and References	30
Organization Chart/Resumes	10
Claims & Suits	10
Submission Meets Specification Requirements	10

2.7 Availability of Funds

In the event that sufficient funds are not available for the project, the District reserves the right to negotiate the scope of this contract, delay implementation, reject all proposals, or award another type of contract other than that required by the RFQ.

2.8 Award of Contract

Upon successful negotiations between the District and the selected proposer, the parties will be required to enter into a written Agreement with the Travis Central Appraisal District. All scopes of work related to the project shall be governed by the executed agreement.

2.9 HB 1295 Requirements

This procurement falls under the requirements of HB1295 (Government Code Section 2252.908). The awarded Contractor will be required to complete and submit form 1295. The form, along with instructions, is available on the Texas Ethics Commission website at <https://www.ethics.state.tx.us/filinginfo/1295/>.

Section 3: Content of Submittal

Each response shall be submitted as outlined in this section. Please include an outside cover and /or first page, containing the section name. A table of contents should be shown first, followed by dividers separating each of the following sections.

3.1 CRITERION ONE: Company Information

- Provide a statement of interest for the Project, including a narrative describing the company and project team's unique qualifications as they pertain to this project.
- Provide the following information for the company:
 - Legal name of the company
 - Address of principal office
 - Address of local office (if applicable)
 - Year Founded
 - Type of Organization (individual, partnership, corporation, joint venture, etc.)
 - Year opened
 - Primary contact name
 - Primary contact title
 - Primary contact e-mail address
 - Primary contact phone number
 - Any former names that the organization operated under
- If your organization is a corporation, answer the following:
 - Date of incorporation
 - State of incorporation
 - President's name
 - Vice President's name
 - Secretary's name
 - Treasurer's name
- If your organization is a partnership, answer the following:
 - Date of organization
 - Type of partnership (if applicable)
 - Name(s) of general partner(s)
- If your organization is individually owned, answer the following:
 - Date of organization
 - Name of owner
- If your organization is another form other than those listed above, describe it and name the principals.

3.2 CRITERION TWO: Claims and Suits

If the answer to any of the items below is yes, please attach details.

- Has your organization ever failed to complete any work awarded?
- Are there any judgments, claims, arbitration proceedings or suits, pending or outstanding, against your organization or its officers?
- Has your organization filed or been involved in any lawsuits or requested neutral third-party arbitration with regard to construction contracts within the last five years?
- Within the last five years, has any officer or principal of your organization ever been an officer or principal of another organization when it failed to complete a construction contract?
- Within the last five years, has any worker's compensation claim been filed by any worker on any job site managed by your organization? If yes, please provide details of the incident and the outcome.

3.3 CRITERION THREE: General Company History and Qualification

- Provide a brief history of the company and each proposed consultant, including a list of services routinely provided
- An organizational chart that explains the team members and their responsibilities related to this project.
- Provide a resume and references for each individual proposed team member.

3.4 CRITERION FOUR: Experience and References

- Discussion of company's experience in working with municipalities or special districts
- List of municipal projects within Texas from the past three years, whether complete or ongoing, including references. For each project, provide the following:
 - Project name and location
 - Year completed
 - Short description of project
 - Name, address, telephone number, and e-mail for owner
 - Name, address, telephone number, and e-mail for contact person tasked with the daily responsibility and management of the project
- List of projects with appraisal districts or assessing offices from the past three years, whether complete or ongoing, including references. For each project, provide the following:
 - Project name and location
 - Year completed
 - Short description of project
 - Name, address, telephone number, and e-mail for owner
 - Name, address, telephone number, and e-mail for contact person tasked with the daily responsibility and management of the project

References shall be considered relevant based on specific project participation and experience with the respondent. The District may contact references during any part of this process. The District reserves the right to contact any other reference at any time during the RFQ process.

3.5 CRITERION FIVE: Method or Approach to Providing Solution

- Provide a summary or overview of the process the company will use to provide the final deliverables. Describe in detail the following:
 - the AI or machine learning models that will be used
 - the combining or ensemble process
 - process for providing land tables and schedules
 - describe data sources and how those will be incorporated and used in the project
 - describe the GIS parcel mapping capabilities and what items will be tracked

3.6 CRITERION EIGHT: Signed Transmittal and Acknowledgement Letter

The Transmittal and Acknowledgement Letter (Exhibit A) must be signed by a principal in the company and submitted as part of the response packet..

3.7 CRITERION TEN: Signed Ethics Statement

The Ethics Statement (Exhibit C) must be signed by a principal in the company and submitted as part of the response packet.

3.8 CRITERION ELEVEN: Signed Certification Regarding Debarment, Suspension & Other Responsibility Matters Form

The Certification Regarding Debarment, Suspension, and Other Responsibility Matters Form (Exhibit D) must be signed by a principal in the company and submitted as part of the response packet.

Section 4: Format for Statement of Qualifications

4.1 General Instructions

- Proposals shall be prepared in order of stated criterion, providing a concise, straightforward description of the respondent's ability to meet the requirements of this RFQ.
- Respondents shall carefully read the information contained in this RFQ and submit a complete response to all requirements and questions as directed. Incomplete proposals will be considered non-responsive and may be subject to rejection.
- Proposals and any other information submitted by respondents in response to this RFQ shall become the property of the District and are subject to the Public Information Act.
- The District will not compensate respondents for any expenses incurred in Proposal preparation or for any presentations that may be made. Respondents submit proposals at their own risk and expense.
- The District makes no representations of any kind that an award will be made as a result of this RFQ. The District reserves the right to accept or reject any or all proposals, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFQ when deemed to be in the District's best interest.
- Qualifications shall consist of answers to criteria provided in Section 3. It is not necessary to repeat the questions in the proposal; however, it is essential to reference the question number with the corresponding answer.
- Failure to comply with all requirements contained in this RFQ may result in the rejection of the proposal.

4.2 Page Size, Binding, Dividers and Tabs

- Responses shall be printed on letter size (8 ½" x 11") paper and collated.
- Separate and identify the response to each criterion in Section 3 of this RFQ by use of a divider sheet.

4.3 Table of Contents

Submittals shall include a Table of Contents and page numbers for each part of the proposal.

Transmittal and Acknowledgment Letter

Travis Central Appraisal District

Request for Proposal- Land Valuation Services

Date

In response to the above referenced request for proposal from Travis Central Appraisal District, the attached qualifications, forms, exhibits, and statements are submitted in response. I have read all attachments, including the specifications, and fully understand what is required.

In submitting this qualifications statement, I agree to the following conditions:

1. Proposals submitted and opened on Wednesday, September 25, 2024, may not be withdrawn for thirty (45) days following the statements opening.
2. To enter negotiations and subsequently execute a Contract with the District, if selected on the basis of the Proposal.
3. To accomplish the work in accordance with the Contract documents.

(Name of Institution)

Authorized Representative:

(Signature)

(Name)

(Title)

(Date)

ETHICS STATEMENT

(Complete and Return this Form with Response)

The undersigned firm, by signing and executing this RFP or RFQ, certifies and represents to the Travis Central Appraisal District that the firm has not offered, conferred or agreed to confer any pecuniary benefit, as defined by 1.07 (a) (6) of the Texas Penal Code, or any other thing of value as consideration for the receipt of information or any special treatment of advantage relating to this RFP or RFQ; the firm also certifies and represents that the firm has not offered, conferred or agreed to confer any pecuniary benefit or other thing of value as consideration for the recipient's decision, opinion, recommendation, vote or other exercise of discretion concerning this RFP or RFQ, the firm certifies and represents that firm has neither coerced nor attempted to influence the exercise of discretion by any officer, trustee, agent or employee of the Travis Central Appraisal District concerning this RFP or RFQ on the basis of any consideration not authorized by law; the firm also certifies and represents that firm has not received any information not available to other firms so as to give the undersigned a preferential advantage with respect to this RFP or RFQ; the firm further certifies and represents that firm has not violated any state, federal, or local law, regulation or ordinance relating to bribery, improper influence, collusion or the like and that firm will not in the future offer, confer, or agree to confer any pecuniary benefit or other thing of value of any officer, trustee, agent or employee of the Travis Central Appraisal District in return for the person having exercised their person's official discretion, power or duty with respect to this RFP or RFQ; the firm certifies and represents that it has not now and will not in the future offer, confer, or agree to confer a pecuniary benefit or other thing of value to any officer, trustee, agent, or employee of the Travis Central Appraisal District in connection with information regarding this RFP or RFQ, the submission of this RFP or RFQ, the award of this RFP or RFQ or the performance, delivery or sale pursuant to this RFP or RFQ.

THE FIRM SHALL DEFEND, INDEMNIFY, AND HOLD HARMLESS THE TRAVIS CENTRAL APPRAISAL DISTRICT, ALL OF ITS OFFICERS, AGENTS AND EMPLOYEES FROM AND AGAINST ALL CLAIMS, ACTIONS, SUITS, DEMANDS, PROCEEDING, COSTS, DAMAGES AND LIABILITIES ARISING OUT OF, CONNECTED WITH, OR RESULTING FROM ANY ACTS OR OMISSIONS OF FIRM OR ANY AGENT OR EMPLOYEE OF FIRM IN THE EXECUTION OR PERFORMANCE OF THIS RFP or RFQ.

I have read all of the specifications and general RFP or RFQ requirements and do hereby certify that all items submitted meet specifications.

FIRM: _____

OFFICER NAME: _____

OFFICER SIGNATURE: _____

ADDRESS: _____

CITY: _____

STATE: _____

ZIP CODE: _____

TELEPHONE: _____

TELEFAX: _____

DEVIATIONS FROM SPECIFICATIONS IF ANY:

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

(Complete and Return this Form with Response)

Name of Entity: _____

The prospective participant certifies to the best of their knowledge and belief that they, the principals in the firm, and the firm:

1. Are not presently debarred, suspended, proposed for debarment, and or declared ineligible from providing bank depository services, financial management, financial records management, financial advisory services, any associated management services, and or voluntarily surrendered their license to provide such related services in the State of Texas and or the United States of America.
2. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from conducting any business and or financial transactions by any department or agency of Federal, State, and or local government.
3. Have not been convicted of, had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
4. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, Local) with commission of any of the offenses enumerated in item 3 above of the certification; and
5. Have not within a ten (10) year period preceding this RFP or RFQ had one or more public transactions (Federal, State, Local) terminated for cause or default.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award. In addition, under 18 USC Section 1001, a false statement may result in a fine up to a \$10,000.00 or imprisonment for up to five (5) years, or both.

Name and Title of Authorized Representative (Typed)

Signature of Authorized Representative

Date