



*Cameron Appraisal District*

# **Cameron Appraisal District Request for Proposals**

Homestead Exemption  
Auditing Service Project

Proposal No: HEA2018

# HOMESTEAD EXEMPTION AUDITING SERVICE PROJECT

Date: March 27<sup>th</sup>, 2018  
Issued by: Cameron Appraisal District  
Representative: Richard Molina  
(956) 399-9322

## 1. Introduction

Cameron Appraisal District is accepting proposals to provide Homestead Exemptions Verification Services. The Request for Proposals must be a “turnkey” solution as described in the scope of work.

The Cameron Appraisal District’s overall goal with this project is to:

1. Identify all erroneous homestead exemptions
2. Assess and Back Assess all accounts up to the 5 years allowable by tax code
3. Provide a more accurate homestead exemption record
4. Provide fair and uniform taxation
5. Provide ISD’s with additional revenues without increasing Values

## 2. Objective

The objective of this Request for Proposal is to contract a vendor that will provide the best overall “turnkey” solution for the value paid by the Cameron Appraisal District. While price is a significant factor, other criteria will form the basis of our award decision, as more fully described in the Evaluation Factors section of this Request for Proposal.

### 3. Scope of Work

The purpose of this project is as follows:

1. Obtain information on all current accounts with a homestead exemption and over 65 exemptions (Approximately 60K parcels) {as deemed by the Property Tax Code}.
2. Review and determine if the name on the account is their current place of residence.
3. Review and determine that the owner or spouse of the account does not have another exemption on CAD records.
4. Review and determine if the account owner or spouse is receiving another homestead exemption in any other county/state records.
5. Perform all necessary research to determine eligibility and accounts with erroneous exemptions.
6. Must perform all necessary notifications to the accounts that require exemption removal. Must comply with Texas Property Tax Code {sending notice regular and certified, etc.}.
7. Contractor must return to the district all the accounts that don't qualify for the exemptions with: all back up data, data detailing which exemptions are to be removed, number of years that the error existed per account, and any other information that helps determine the back assessment.
8. To provide a "turnkey" solution. {The districts interpretation of turnkey is contractor performs all services as stated with the exception of the removal of the exemptions and back assessing the accounts}.
9. Does Vendor offer Long Term Continuous Support or a solution for entering new applications?

### 4. Evaluation Factors

The district will use many factors to determine the proposal that will be contracted. The contract will not be awarded solely on price but will include other factors as listed below.

1. Cost for Turnkey Solution (approximately 60k homestead exemptions). Note: Proposers responsibility to verify homestead total for more accuracy. All homestead accounts will be required once contract is accepted.
2. Conditions of payment. Proposer must specify acceptable payment options and other flexibilities.
3. Turnkey solution: The district is requesting minimal work to be performed by the district.
4. Return on Investment Projection (ROI).
5. Proposal Guarantee
6. References

## 5. Proposal Worksheet

Please fill in the proposed price and complete each numerical section as requested.

<p><b>Proposal Cost – The estimated cost of this proposal should be based on approximately 60K parcels. The actual amount should be included in this proposal and quoted on a lump sum basis. Price should include all cost associated in a “turnkey” product.</b></p>	
Description	Proposed Price
<b>1. Cost of Turnkey Solution</b>	
<b>2. Conditions of payment – On a separate sheet explain the terms of payment and flexibility.</b>	
<b>3. Turnkey Solution – On a separate sheet explain what is covered in the proposal and what is not covered by the proposal.</b>	
<b>4. Return on Investment (ROI) – On a separate sheet list the projected return on investments this proposal is expected to produce. ROI is not to include future years. It is the proposer’s responsibility to acquire their own test data.</b>	
<b>5. Proposal Guarantee – On a separate sheet list &amp; explain how you guarantee the positive results of your services.</b>	
<b>6. References – On a separate sheet provide reference information of other appraisal districts that are currently or have recently used your product. Also include current contracts in the work.</b>	
<b>7. Does your firm or software offer a solution for reviewing applications on a daily routine for future use? If so, state fee’s associated {do not include the cost of the option within your proposal price}. On a separate sheet provide all cost associated with this service (annual fee preferred).</b>	
<b>8. State the estimated time to complete a “turnkey” solution. Please make sure to include all time needed for notification, etc.</b>	

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

\_\_\_\_\_  
Vendor Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
C.A.D. Representative

\_\_\_\_\_  
Date

## 6. Submission Guidelines & Requirements

The following submission guidelines & requirements apply to this Request for Proposal:

1. First and foremost, only qualified individuals or firms with experience on projects such as this should submit proposals in response to this Request for Proposal.
2. District reserves the right to modify the RFP in order to obtain a turnkey solution.
3. Pricing must be a lump sum.
4. Proposer must seek test data in order to accurately price the proposal.
5. District may add completion cost if a turnkey product is not submitted in order to determine overall cost.
6. Proposer must be willing to begin as soon as contract is awarded unless another date is agreed upon.
7. Proposals must be signed by a representative that is authorized to commit the company.
8. Mail signed proposals to:

Cameron Appraisal District  
P.O Box 1010  
San Benito, Texas 78586

Or deliver to:

Cameron Appraisal District  
2021 Amistad Dr.  
San Benito, Texas 78586

9. Proposals must be received prior to April 12, 2018 to be considered.
10. Proposals must remain valid for a period of 60 days.
11. Please submit 3 copies with original signatures for retention of original copies by Vendor, C.A.D. Representative and C.A.D. Administration.

## 7. RFP & Project Timelines

The Request for Proposal timeline is as follows:

Proposal Publish Date / Newspaper Ad	April 1 <sup>st</sup> & 8 <sup>th</sup> 2018
Proposal Due Date	April 12 <sup>th</sup> , 2018 by 7:30am
Presentation / Recommendation of Proposals to Board of Directors	April 16 <sup>th</sup> 2018

## 8. Evaluation Factors

Cameron Appraisal District will rate proposals based on the following factors, with cost being an important factor along with:

1. Responsiveness to the requirements set forth in this Request for Proposal
2. Submission of pricing as a turnkey product
3. Cameron Appraisal District's review of vendors references and responses to questions

Cameron Appraisal District reserves the right to award the contract to the proposer that presents the best value to Cameron Appraisal District as determined solely by Cameron Appraisal District in its absolute discretion.