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5. Action Items

- a. Consideration and action regarding approval of Minutes of February 12, 2021**

**Tarrant Appraisal District
Board of Directors Meeting Minutes
February 12, 2021**

Due to health and safety concerns related to the COVID-19 epidemic, the February 12, 2021 meeting was conducted by telephone conference call in accordance with the Texas Open Meeting Act, suspensions of certain requirements of the Act announced by the Office of the Texas Governor on March 16, 2020 and applicable directives and guidance from the Governor since the state of disaster was first declared on March 13, 2020.

These Minutes are a summary of only the subjects the Board addressed and the actions it took. For details, see the Agenda, complete Agenda Packet(s), and full Audio Recording of the February 12, 2021 meeting that are posted on Tarrant Appraisal District's website at this URL:

<https://www.tad.org/about/board-of-directors/>

Times noted in parentheses below refer to that Audio Recording.

Members who participated by telephone conference call:

Ms. Kathryn Wilemon, Chairman
Mr. Rich DeOtte, Secretary
Ms. Wendy Burgess
Mr. Gary Losada
Mr. J. R. Martinez
Mr. Tony Pompa

Also participating:

Mr. Jeff Law, Chief Appraiser
Ms. Catherine Jane Alder, District's attorney

Ms. Wilemon called the meeting to order (*starts at 0:00:09*); Mr. Law verified the presence of a quorum (with five of the six members present and Mr. Pompa absent at that time) and verified timely posting of notice of the meeting; Mr. Martinez led the pledge of allegiance and delivered the invocation. The Board then took up the following Agenda items.

4. Recognize Visitors; Hear Public Comments (*starts at 0:02:10; resumes at 0:12:24*)

The Board recognized and heard comments from Mr. Daniel J. Bennett.

5. Action Items (*starts at 0:17:37*)

Mr. Pompa having joined the meeting and Mr. DeOtte's audio connection having been reestablished, Mr. DeOtte moved to remove Action Item 5(c) from this agenda and postpone discussion of that issue until a special meeting in March; Mr. Martinez seconded the motion; and the motion carried unanimously.

a. Consent Agenda Items (starts at 0:20:20)

Ms. Wilemon called for a motion to approve Consent Agenda Items; Mr. DeOtte asked to pull Items 5(a)(4) and 5(a)(5) from the Consent Agenda.

Mr. DeOtte moved to approve Consent Agenda Items 5(a)(1) through 5(a)(3); Mr. Martinez seconded the motion; and the motion carried unanimously.

(1) Consider and Act on Approval of Minutes of January 15, 2021 Meeting

(2) Consider and Act on Renewal of the Annual "CoStar Suite" Subscription

Staff Recommendation approved:

Authorize renewal of the annual subscription with CoStar Realty Information, Inc. for the "CoStar Suite" of services at a total cost not to exceed \$51,482.52.

(3) Consider and Act on Purchase of Microsoft Office 2019 License Upgrade

Staff Recommendation approved:

Authorize purchase of Microsoft Office 2019 Software Part # 021-10626, # 381-04518, and # 79P-05746 through Texas Department of Information Resources contract # DIR-TSO-4092 in an amount not to exceed \$80,452.52.

(4) Consider and Act on proposed revision of Personnel Policies and Procedures (starts at 0:21:42)

Ms. Burgess moved to approve only the proposed change of Section 25.0 Telecommuting Policy and revisit later the other items that need to be clarified; Mr. DeOtte seconded the motion; and the motion carried unanimously. (starts at 1:03:45)

(5) Consider and Act on proposed revision of Purchasing Policies and Procedures (starts at 1:08:57 in conjunction with Item 5(a)(5); resumes 2:01:12)

Mr. Pompa moved to approve the policy as presented to us by counsel with all the changes, including Mr. Losada's changes we just made; Mr. Martinez seconded the motion; and the motion carried unanimously.

b. Consider and Act on proposed further amendment of Purchasing Policies and Procedures to provide: "That any contract, Billing Agreement or Letter of Agreement in excess of \$50,000 individually or in the aggregate whether provided for or not in the budget be submitted to the TAD Board of Directors for approval prior to issuance" (starts at 1:11:25)

Mr. Losada moved,

That Tarrant Appraisal District Board of Directors adopt the following resolution, 'Now therefore let it be resolved that the Tarrant Appraisal District Board of Directors hereby amends the Purchasing Policies and Procedures to read, "That any contract, Billing Agreement or Letter of Agreement in excess of \$50,000 individually or in the aggregate whether provided for or not in the budget be submitted to the TAD Board of Directors for approval prior to issuance."

Mr. DeOtte seconded the motion; and the motion carried unanimously.

c. Consideration and action relative to engaging Ad Valorem Protest Review services

As noted above, the Board removed this item from this agenda and postponed discussion of that issue until a called meeting in March.

6. Information Items (starts at 2:07:00)

a. Report by Taxpayer Liaison Officer (starts at 2:13:56)

Ms. Jacobson reported matters referred to her in January 2021 and recapped activity in 2020.

b. Report by ARB Chairman

Mr. Bunker gave no report.

c. Report by Chief Appraiser (starts at 2:08:40)

Mr. Law reported on the following items and expressed his appreciation for Mr. Ron Wright services and condolences to his family on his passing.

- (1) Certificate of Achievement for Excellence in Financial Reporting from Government Finance Officers Association
- (2) 2020-21 Final Methods and Assistance Program Review report

7. Propose Future Agenda Items; Set Next Meeting Date; Adjourn (starts at 2:17:00)

Other than Item 5(c) being removed from this agenda and postponed to be discussed in a called meeting in March, as noted above, there were no suggestions for future agenda items.

The called meeting will be Friday, March 26, 2021 at 9:00 a.m. with Board members attending in person, if circumstances permit and at each member's option, and with the public participating remotely.

The meeting adjourned. *(at 2:27:55)*

5. Action Items

- b. Consideration and action relative to engaging Ad Valorem Protest Review services**

By Year, Protests to Parcel Compari

2019

Appraisal District	Protests for 9.1.1 - 9.1.4	***	# Of Parcels	# Of Protests
		# Of Parcels for 5.1.1,5.1.3 (% based on 2016)		
Bexar	98,304	695,354	695,354	117,655
Dallas	116,975	836,559	836,559	155,336
Harris	351,432	1,821,544	1,821,544	420,523
Tarrant	126,095	732,538	1,832,240	153,871
Travis	122,815	449,084	449,084	147,695

2018

Appraisal District	Protests for 9.1.1 - 9.1.4	***	# Of Parcels	# Of Protests
		# Of Parcels for 5.1.1,5.1.3 (% based on 2016)		
Bexar	89,173	656,395	686,395	108,119
Dallas	113,143	832,174	832,174	138,285
Harris	306,015	1,797,300	1,797,300	371,300
Tarrant	143,105	720,510	1,811,688	148,067
Travis	121,632	439,772	439,772	142,698

2017

Appraisal District	Protests for 9.1.1 - 9.1.4	***	# Of Parcels	# Of Protests
		# Of Parcels for 5.1.1,5.1.3 (% based on 2016)		
Bexar	84,032	679,088	679,088	103,268
Dallas	98,929	830,464	830,464	126,967
Harris	324,198	1,826,786	1,826,786	388,762
Tarrant	169,746	712,416	1,755,231	129,594
Travis	106,663	431,339	431,339	126,425

2016

Appraisal District	Protests for 9.1.1 - 9.1.4	***	# Of Parcels	# Of Protests
		# Of Parcels for 5.1.1,5.1.3 (% based on 2016)		
Bexar	76,575	670,220	671,217	95,721
Dallas	97,348	826,463	828,387	117,271

Harris	318,355	1,618,997	1,623,452	382,555
Tarrant	103,970	695,838	1,253,623	105,132
Travis	95,552	423,981	423,981	115,733

*** Parcel numbers recorded at the comptroller's office has changed over time and the numbers provided here to be representative.

Source: Comptroller's Office, Operations Survey Data by Year.

isons

% Of Protests To Parcels	# Of Lawsuits	% Protests to Parcels
16.92%	1,336	14.1%
18.57%	1,826	14.0%
23.09%	6,455	19.3%
8.40%	1,620	17.2%
32.89%	1,503	27.3%

% Of Protests To Parcels	# Of Lawsuits	% Protests to Parcels
15.75%	1,406	13.6%
16.62%	1,938	13.6%
20.66%	7,353	17.0%
8.17%	1,221	19.9%
32.45%	1,228	27.7%

% Of Protests To Parcels	# Of Lawsuits	% Protests to Parcels
15.21%	1,370	12.4%
15.29%	1,437	11.9%
21.28%	4,980	17.7%
7.38%	980	23.8%
29.31%	894	24.7%

% Of Protests To Parcels	# Of Lawsuits	% Protests to Parcels
14.26%	1,177	11.4%
14.16%	1,413	11.8%

23.56%	4,492	19.7%
8.39%	728	14.9%
27.30%	716	22.5%

in vary as to source. They are believed

**AGENDA PACKET
SUPPLEMENT**

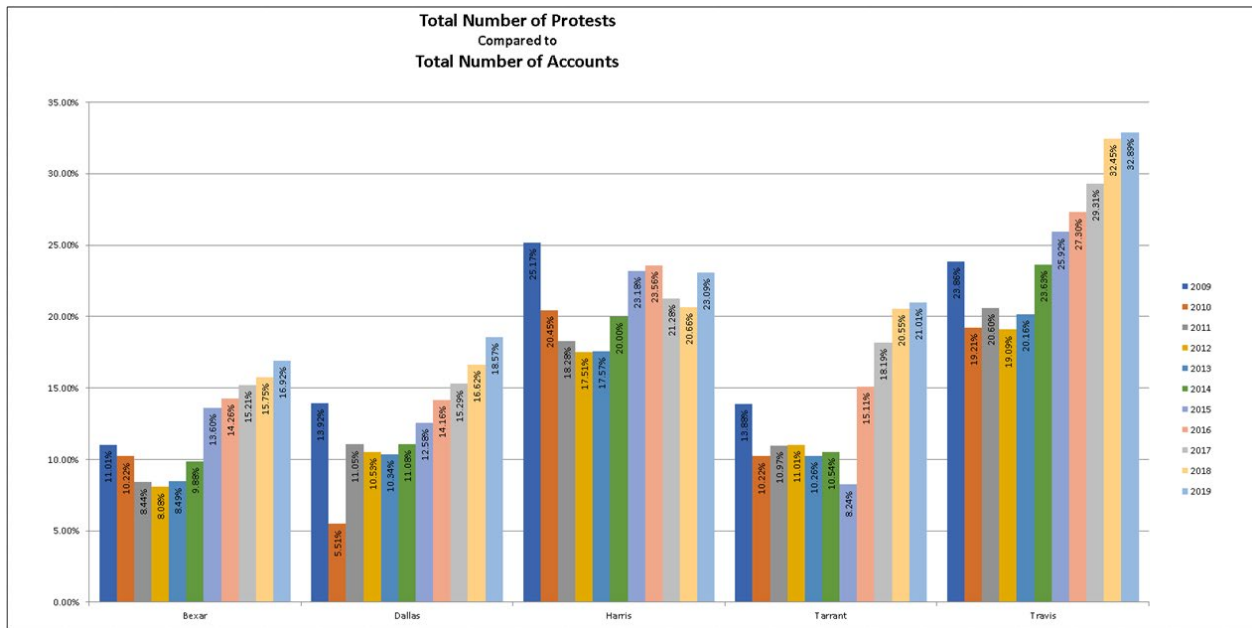
**Board of Directors of Tarrant Appraisal District
January 15, 2021**

Agenda Item 6: Review of protests of property tax appraisals in Tarrant County as compared to other major metropolitan counties and related issues

In the Board’s meeting on December 11, 2020, Mr. DeOtte requested that the protest audit, response to letter from Senator Nelson, and related matters be included as a discussion item on the agenda for the next meeting.

On December 21, Mr. DeOtte asked that research into protests be expanded to include years 2009 through 2014. Staff started doing so. However, for some of those earlier years appraisal districts were not required to collect and report data corresponding directly to what TAD staff previously provided to the Board. For some of the years 2009 through 2014 that appraisal districts were required to collect and report data that directly corresponds to what TAD staff previously provided to the Board for 2015 through 2019, collecting and analyzing information is still in progress. To the extent that data for those earlier years are collected and can be used for apples-to-apples comparisons, TAD staff will add prior years to the charts provided to the Board on December 9.

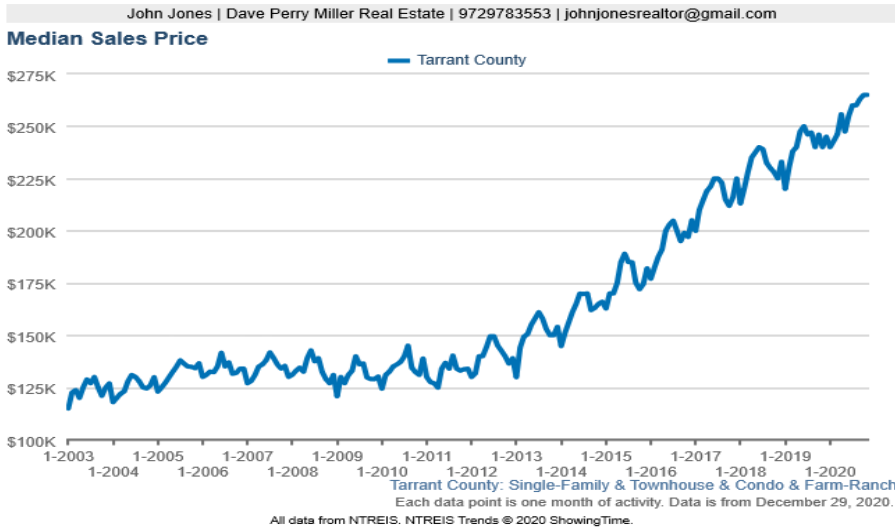
From the information in hand and with some interpolations, TAD staff offers the following preliminary overviews:



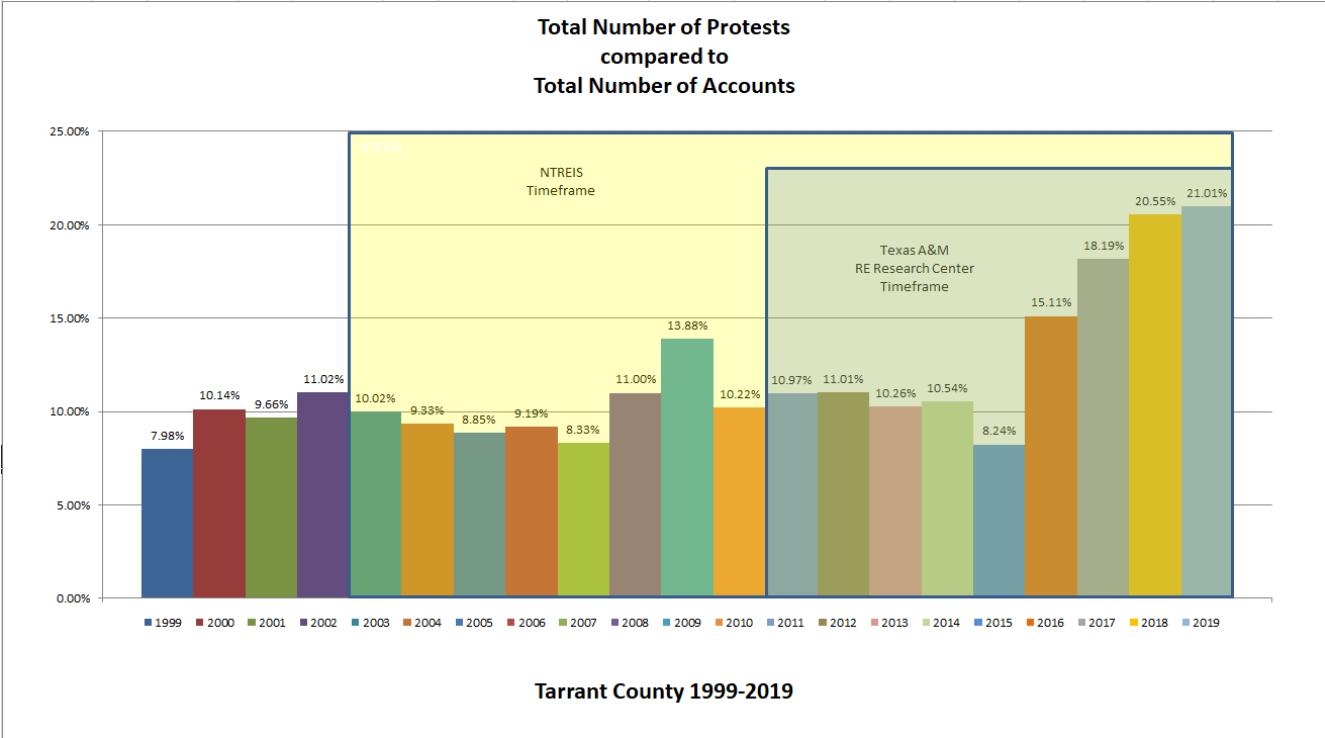
Note: Total parcel counts for 2012 and 2013 for Bexar, Dallas, Harris and Travis counties are interpolated based on the best information available to TAD staff.

Median Sales Price Chart for Homes in Tarrant County, Texas

Tarrant County began to see a marked increase in home prices around 2013 which it has mostly sustained in recent years.



Source: Texas A&M Real Estate Research Center



Source: TAD records

For easy reference to background on this agenda item, see the documents that follow.

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The Senate of the State of Texas

Jane Nelson
Senate District 12

Committees:

FINANCE, CHAIR
TRANSITION LEGISLATIVE OVERSIGHT
COMMITTEE, CO-CHAIR
STATE AFFAIRS
LEGISLATIVE BUDGET BOARD
LEGISLATIVE AUDIT COMMITTEE
PARTNERSHIP ADVISORY COMMITTEE

April 30, 2020

Mr. Mike O'Donnell
Chairman, Tarrant Appraisal District Board of Directors
2500 Handley-Ederville Road
Fort Worth, TX 76118-6909

Dear Mr. O'Donnell,

I hope this letter finds you safe and healthy. I am writing to make you aware of testimony at the Senate Finance Committee's February hearing to monitor appraisal-related legislation.

Specifically, our committee received an interim charge related to appraisal districts. In preparation for and during the hearing, the committee received information demonstrating a significant increase in appraisal protests in Tarrant County over the past five years. As I understand it, the number of protests in Tarrant County far exceed the increases in other major metropolitan counties. On behalf of the constituents I represent in Tarrant County, I would request that the Board of Directors investigate the reasons for such a large increase -- and to specifically look into whether software used by the district is playing a role. Troubles with the software were cited in a recent audit, and I would be interested to know what steps have been taken to address the issues.

I have filed appraisal reform legislation the past two legislative sessions, and the Legislature has approved reforms in response to our constituents who want to make sure appraisals are fair and transparent. As your State Senator, I welcome any suggestions you may have for statutory changes at the state level to increase the Board of Director's ability to govern the District and its personnel. If you would like more information on this or other information received by my office please contact my Legislative Director Michael Ruggieri at Michael.ruggieri@senate.texas.gov.

The job with which you have been entrusted is vital and directly impacts hundreds of thousands of taxpayers each year. I greatly appreciate your service.

Very truly yours,

A handwritten signature in black ink that reads "Jane Nelson".

Senator Jane Nelson

CC: TCAD Board of Directors



December 9, 2020

Mr. Michael Ruggieri
Legislative Director
Office of Senator Jane Nelson

Michael.ruggieri@senate.texas.gov

Dear Mr. Ruggieri:

The attached report provides updated and corrected information about protests of property tax appraisals in Tarrant County.

In an earlier letter to the former Chairman of Tarrant Appraisal District Board of Directors, Senator Nelson wrote that information given to the Senate Committee on Finance “demonstrate[s] a significant increase in appraisal protests in Tarrant County” over the past five years and that she understood the information to indicate that “the number of protests in Tarrant County far exceed the increases in other major metropolitan counties”. I was asked to respond for TAD to Senator Nelson’s letter.

The attached report corrects information that has led to misconceptions about protests in Tarrant County. It uses the most up-to-date reports published by the Comptroller to make and analyze apples-to-apples comparisons of protest data for the five largest appraisal districts over the past five years. It also addresses the other requests in Senator Nelson’s earlier letter.

We will gladly answer questions about the matters summarized in the report and would welcome discussion.

Respectfully,

Jeff Law
Executive Director/Chief Appraiser

cc with attached report:
Wendy Burgess
Rich DeOtte

Gary Losada
J.R. Martinez
Tony Pompa
Kathryn Wilemon



December 9, 2020

**REPORT RESPONDING TO SENATOR NELSON’S REQUESTS
ABOUT PROTESTS OF PROPERTY TAX APPRAISALS
IN TARRANT COUNTY AND RELATED ISSUES**

Information given to the Senate Committee on Finance¹ earlier this year has been read to “demonstrate[] a significant increase in appraisal protests in Tarrant County” over the past five years and that “the number of protests in Tarrant County far exceed the increases in other major metropolitan counties”. Some people have suggested further and more specifically that (1) the numbers of protests in Tarrant County were excessive in comparison to protests in the four other largest counties over the past five years; and (2) increases in the number of protests in Tarrant County over the past five years indicate systemic and ongoing errors or disparities in valuations. This report provides corrected and additional information to alleviate these concerns.

Close study revealed that a critical data point in information given to the Committee – “Tot. Protests” for Tarrant County in 2019 – is not correct in the context it is used. All of the other “Tot. Protests” entries on Exhibit 1 are or are very close approximations of the numbers that the respective appraisal districts reported to the Comptroller in response to item 9.1 in the annual Operations Survey. Specifically, all of those other numbers are “how many protests to the ARB were filed in [the year]”. The corresponding number for Tarrant County for 2019 is 153,871, not 208,000.

When addressing ALL CATEGORIES OF PROPERTY, this report’s # PROTESTS entry for Tarrant County for 2019 is the 153,871 that Tarrant Appraisal District (TAD) reported to the Comptroller as “how many protests to the ARB were filed in 2019”. All other # PROTESTS entries for ALL CATEGORIES OF PROPERTY are likewise the exact numbers that TAD and the appraisal districts for each of the other four largest counties reported to the Comptroller for each of the past five years as “how many protests to the ARB were filed in [the year]”.²

When addressing CATEGORY A – SINGLE-FAMILY RESIDENTIAL PROPERTIES, these report’s # PROTESTS entries are the exact numbers that TAD and the appraisal districts for the other four largest counties reported to the Comptroller for each of the

¹ Such information includes but is not limited to the table and graphs attached as Exhibit 1.

² Texas Comptroller of Public Accounts (“Comptroller”), Property Tax Survey Data and Reports, “Operations Survey Data”, Additional Resources, <https://comptroller.texas.gov/taxes/property-tax/reports/index.php>, at Tab 9.1 for each year at issue.

past five years as “of the total number of protests filed in [the year], how many were for single-family residential property”.³

Identifying sources of numbers and defining terms are necessary because “protest” is a term used informally in the property tax community to mean many different things. For example, the Comptroller uses “Protest” as the heading for Tab 9 of its annual Operations Survey to include not only “protests to the ARB [that] were filed in [the year]” but also “informal process (that is, through meetings, teleconferences or online with appraisal district staff) to resolve concerns, inquiries or protests filed in [the year]”.⁴ “Protests to the ARB [that] were filed in [the year]” may fairly readily be read to mean “notices of protest” that are “filed” with “appraisal review boards” in the “tax year” as those terms are defined and used in the Code.⁵ By contrast, “informal process”, “concerns”, and “inquiries” are not defined by or used in the Code. Like “meetings”, “telephone conferences”, and online contacts, they are also not susceptible to routine and accurate counting and reporting. While a particular appraisal district might devise informal processes of its own for handling and recording all such contacts with property owners and their agents, the Code and the Comptroller do not provide any guidance on doing so. Therefore, individual appraisal districts’ reported numbers of such activities cannot be meaningfully compared to one another.

The 208,000 listed as “Tot. Protests” on Exhibit 1 for Tarrant County for 2019 is TAD’s own rounded estimate for its own use that includes not only an estimate of the “how many protests to the ARB were filed in 2019” but also tens of thousands of issues that TAD and property owners or their agents resolved informally without a notice of protest being filed with Tarrant Appraisal Review Board. Most of these informal resolutions were for accounts that professional property tax consultants “worked” with TAD staff before the statutory deadline for filing a notice of protest.

The Committee heard testimony that the 208,000 entry on Exhibit 1 was gleaned from a report in the December 13, 2019 meeting of Tarrant Appraisal District Board of Directors. In that meeting, I reported that TAD had handled 208,000 “protests” that year. I used “protests” there as TAD and Tarrant Appraisal Review Board routinely use it as described in the preceding paragraph. The 208,000 estimate is correct in its context as part of benchmark calculations by which TAD and Tarrant Appraisal Review Board monitor their coordinated efforts each year toward approval of the appraisal records, certification of the appraisal rolls, and subsequent additions to those records and rolls.

Both the 208,000 number of total “protests” that I used colloquially in the December 13, 2019 meeting and the 153,871 number of “how many protests to the ARB were filed in

³ Comptroller, Property Tax Survey Data and Reports, “Operations Survey Data”, Additional Resources, <https://comptroller.texas.gov/taxes/property-tax/reports/index.php>, at Tab 9.1.1 for each year at issue.

⁴ Comptroller, Property Tax Survey Data and Reports, “Operations Survey Data”, Additional Resources, <https://comptroller.texas.gov/taxes/property-tax/reports/index.php>, at Tabs 9, 9.7 – 9.10.

⁵ Staff of the Comptroller say this is what Tab 9.1 means.

2019” that TAD reported to the Comptroller in response to the Operations Survey are correct in their respective contexts. Through miscommunication or misunderstanding, 208,000 was mistakenly provided to the Committee instead of 153,871.

This report corrects that and other information that have led to misconceptions about protests in Tarrant County. It uses the most up-to-date reports published by the Comptroller to make and analyze apples-to-apples comparisons of protest data for the five largest counties over the past five years. The report also addresses the other requests made on behalf of the Committee.

Key Findings:

- 1) In each of the past four years the rates of protests in Tarrant County (numbers of notices of protests property owners filed with Tarrant Appraisal Review Board as a percentage of total property accounts appraised by Tarrant Appraisal District⁶) and the rates of orders determining protests in Tarrant County (numbers of orders determining protest issued by Tarrant Appraisal Review Board as a percentage of total property accounts appraised by Tarrant Appraisal District) have been in line with the corresponding rates in the four other largest counties. Those rates are in columns C and E, respectively, in the two tables below. Both rates in Tarrant County in 2016 through 2019 have been less than the corresponding rates in Travis and Harris Counties and more than the rates in Dallas and Bexar Counties, as shown here in for all categories of property⁷:

[continued on next page]

⁶ In this report, Category G properties are not included in “total property accounts appraised by Tarrant Appraisal District” for the reasons explained in the next footnote.

⁷ In this report “all categories of properties” is literally that for Bexar, Dallas, Harris, and Travis counties. Because Tarrant County has far more accounts for Category G properties (oil and gas, minerals, and other sub-surface interests) than those other counties, I have excluded Tarrant County’s Category G accounts from the # ACCOUNTS entries in this report. Omitting the hundreds of thousands of Category G accounts for Tarrant County while including the relatively few such accounts for the other counties raises substantially Tarrant County’s percentages of protest filed in columns C and the percentages of orders issued in columns E but provides a more fair and meaningful apples-to-apples comparison between Tarrant County and the other counties.

PROTESTS FILED AND ORDERS ISSUED AS PERCENTAGES OF TOTAL PROPERTY ACCOUNTS ALL CATEGORIES OF PROPERTY					
YEAR COUNTY	A # ACCOUNTS	B # PROTESTS	C B ÷ A	D # ORDERS	E D ÷ A
2016					
Travis	423,981	115,733	27.30%	16,314	3.85%
Harris	1,623,452	382,555	23.56%	112,968	6.96%
Tarrant	695,838	105,132	15.11%	57,547	8.27%
Bexar	671,217	95,721	14.26%	13,067	1.95%
Dallas	828,387	117,271	14.16%	51,171	6.18%
2017					
Travis	431,339	126,425	29.31%	17,712	4.11%
Harris	1,826,786	388,762	21.28%	117,542	6.43%
Tarrant	712,416	129,594	18.19%	53,528	7.51%
Dallas	830,464	126,967	15.29%	50,561	6.09%
Bexar	679,088	103,268	15.21%	13,760	2.03%
2018					
Travis	439,772	142,698	32.45%	26,618	6.05%
Harris	1,797,300	371,300	20.66%	129,717	7.22%
Tarrant	720,510	148,067	20.55%	32,130	4.46%
Dallas	832,174	138,285	16.62%	59,939	7.20%
Bexar	686,395	108,119	15.75%	17,801	2.59%
2019					
Travis	449,084	147,695	32.89%	85,401	19.02%
Harris	1,821,544	420,523	23.09%	138,644	7.61%
Tarrant	732,537	153,871	21.01%	36,110	4.93%
Dallas	836,559	155,336	18.57%	71,235	8.52%
Bexar	695,354	117,655	16.92%	14,113	2.03%

The same is true when we drill down to the largest single category of property⁸, as shown here for single-family residential properties:

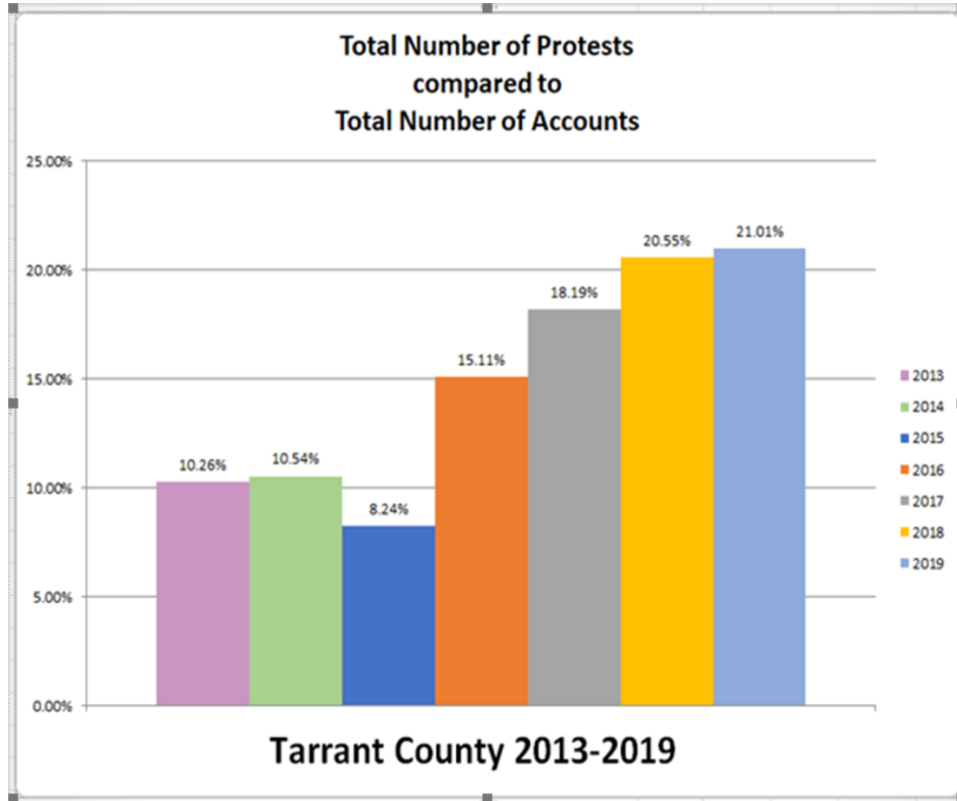
[continued on next page]

⁸ The largest single category of property in Tarrant County is Category G (oil and gas, minerals, and other sub-surface interests). As explained in the preceding footnote, this report excludes accounts for Category G properties from # ACCOUNTS entries. Doing so leaves Category A single-family residences as Tarrant County's largest single category of property.

PROTESTS FILED AND ORDERS ISSUED AS PERCENTAGES OF TOTAL PROPERTY ACCOUNTS CATEGORY A – SINGLE-FAMILY RESIDENTIAL PROPERTIES					
YEAR COUNTY	A # ACCOUNTS	B # PROTESTS	C B ÷ A	D # ORDERS	E D ÷ A
2016					
Travis	288,845	74,431	25.77%	6,107	2.11%
Harris	1,092,662	265,491	24.30%	75,576	6.92%
Tarrant	517,998	67,303	12.99%	41,233	7.96%
Dallas	582,404	65,578	11.26%	31,803	5.46%
Bexar	500,655	56,216	11.23%	5,168	1.03%
2017					
Travis	295,061	85,798	29.08%	5,725	1.94%
Harris	1,105,917	269,967	24.41%	80,651	7.29%
Tarrant	523,948	103,897	19.83%	30,283	5.78%
Bexar	507,717	63,512	12.51%	5,621	1.11%
Dallas	585,155	67,989	11.62%	30,797	5.26%
2018					
Travis	302,703	99,518	32.88%	11,017	3.64%
Harris	1,122,938	251,748	22.42%	91,252	8.13%
Tarrant	530,565	112,916	21.28%	15,770	2.97%
Dallas	588,429	79,486	13.51%	36,596	6.22%
Bexar	515,283	68,083	13.21%	6,104	1.18%
2019					
Travis	309,551	102,962	33.26%	61,146	19.75%
Harris	1,135,992	295,558	26.02%	97,955	8.62%
Tarrant	540,391	79,233	14.66%	14,834	2.75%
Bexar	523,589	76,682	14.65%	5,088	0.97%
Dallas	591,681	81,234	13.73%	43,324	7.32%

- 2) 2015 is the only one of the past five years in which Tarrant County’s rates of protests in columns C and rates of orders determining protests in columns E have not been in line with the corresponding rates for the four other largest counties. In 2015, the numbers of protests filed in Tarrant County was atypically low, both in comparison to past and subsequent years’ numbers in Tarrant County as shown in the first graphic below and in comparison to the four other largest counties as shown in the second and third graphics below:

[continued on next page]



**PROTESTS FILED AND ORDERS ISSUED
AS PERCENTAGES OF TOTAL PROPERTY ACCOUNTS
ALL CATEGORIES OF PROPERTY**

YEAR COUNTY	A # ACCOUNTS	B # PROTESTS	C B ÷ A	D # ORDERS	E D ÷ A
2015					
Travis	416,545	107,977	25.92%	10,084	2.42%
Harris	1,605,389	372,146	23.18%	128,193	7.99%
Bexar	663,031	90,191	13.60%	12,769	1.93%
Dallas	824,948	103,770	12.58%	46,181	5.60%
Tarrant	688,208	56,703	8.24%	21,215	3.08%

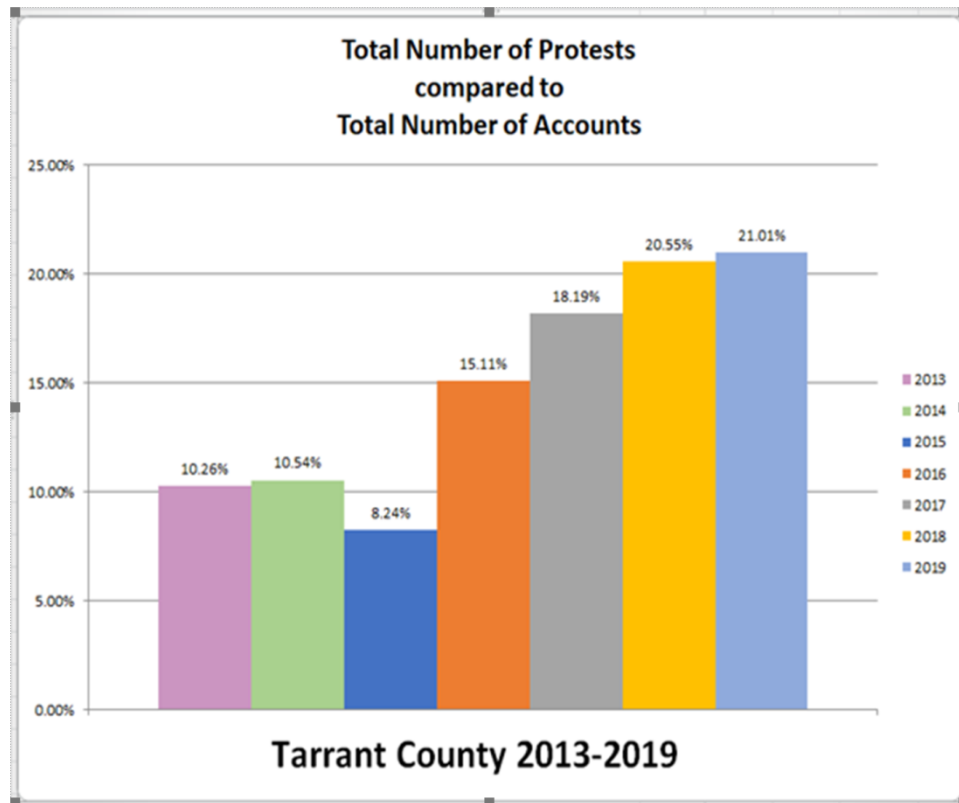
**PROTESTS FILED AND ORDERS ISSUED
AS PERCENTAGES OF TOTAL PROPERTY ACCOUNTS
CATEGORY A – SINGLE-FAMILY RESIDENTIAL PROPERTIES**

YEAR COUNTY	A # ACCOUNTS	B # PROTESTS	C B ÷ A	D # ORDERS	E D ÷ A
2015					
Travis	283,415	70,536	24.89%	4,602	1.62%
Harris	1,080,328	258,167	23.90%	93,494	8.65%
Bexar	493,396	52,636	10.67%	5,266	1.07%
Dallas	580,357	52,634	9.07%	28,467	4.91%
Tarrant	511,772	28,386	5.55%	13,158	2.57%

The atypically low numbers of protests in 2015 coincided with and are believed to have been caused by atypically low appraised values that year. The causes and corrections of those anomalies are addressed in Finding 4 below.

- 3) Whether you look at the increases in Tarrant County’s numbers and rates of protest in Columns B and C for 2016 through 2019 standing alone or compared to the rates for the other four largest counties, there are no aberrations that suggest systemic and ongoing errors or disparities in TAD’s valuations.

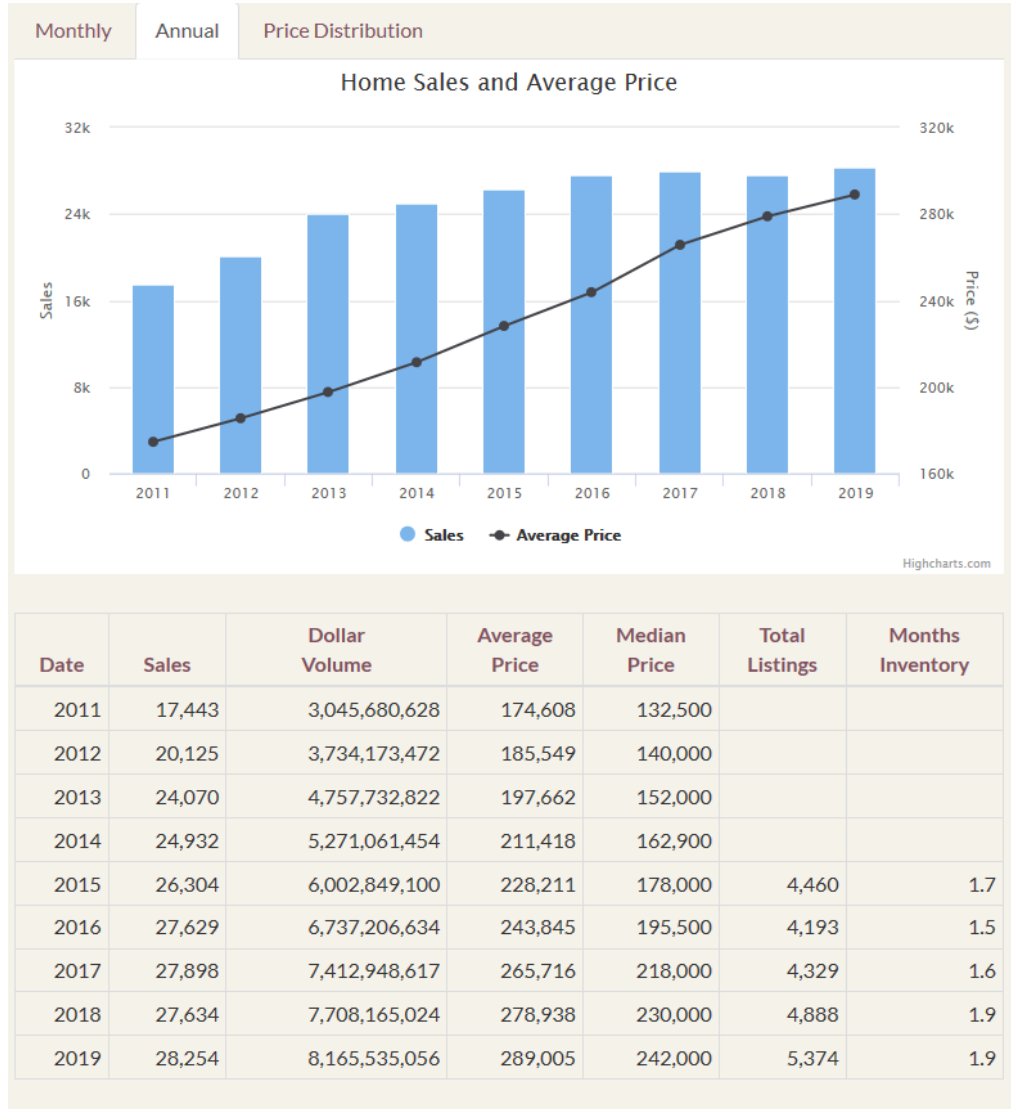
Looking beyond Tarrant County’s protests statistics to its real estate market, we see that the increases in protests in 2016 through 2019 follow much the same upward trend as home sales prices. For example, compare this chart in finding 2) above



to the chart below of home sales prices in Tarrant County compiled by the Real Estate Center at Texas A&M University (Real Estate Center)⁹

⁹ <https://www.recenter.tamu.edu/about-us/about-the-center/>. “The Real Estate Center at Texas A&M University ... is the nation’s largest publicly funded organization devoted to real estate research. Most of our \$5.1 million in annual funding comes from real estate license fees paid by more than 170,000 professionals. A nine-member advisory committee appointed by the governor provides research guidance and approves the budget. The Center’s staff conducts research on financial, socioeconomic, public policy, trade, legal, land use and local market analysis issues related to real estate.”

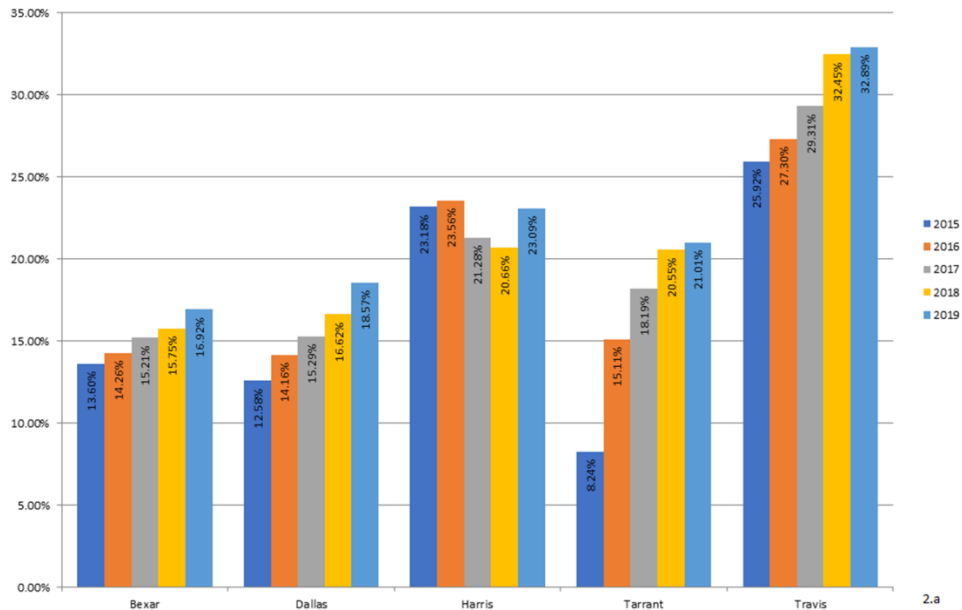
Tarrant County 2011 - 2019



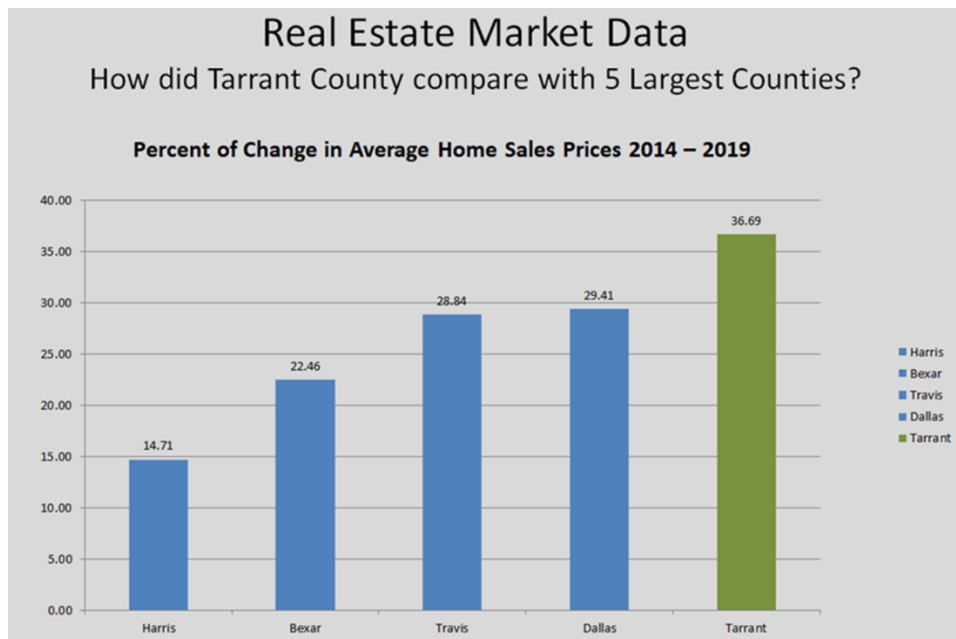
Determining what causes property owners' protests is beyond the scope of this report but correlations shown in these two charts suggest that, in 2016 through 2019, rising real estate prices, rising property tax valuations, and rising property taxes are more likely the main drivers of rising protests numbers and rates than some unidentified systemic flaw in TAD's valuation processes.

Home sales prices in Bexar, Dallas, and Travis Counties also follow much the same upward trends as their respective protest numbers in 2016 through 2019. Compare their numbers and rates of protests in the following chart:

**Total Number of Protests
Compared to
Total Number of Accounts**



to increases in their home sales prices for the same period shown in this chart¹⁰:



Other independent analyses also support the conclusion that TAD’s valuations processes produced 2016 through 2019 values that increased in step with the real estate market in those years. For example, the Comptroller’s

¹⁰ Compiled by TAD staff using Real Estate Center’s home sales data in Exhibit 2.

Property Value Study (PVS) results during that period indicate that TAD’s appraisal roll values hit at or very close to fair market values.

While the primary purpose for the PVS is to ensure equitable distribution of education funds to school districts, its secondary purpose is to collect data to provide taxpayers, school districts, appraisal districts and the Legislature with measures of appraisal district performance. The bottom lines of TAD’s Final Property Value Study Results for both 2017 and 2019 are that TAD’s test values for properties in all school districts were “within confidence interval”. In other words, based on the Comptroller’s independent sampling and appraisal of 14,149 properties in 2017,¹¹ and 10,618 properties in 2019,¹² the Comptroller concluded that TAD’s valuations across the county fell between 95% and 105% of fair market value.

- 4) From discussion in the Committee’s February meeting it appears that some members saw the number of protests in Tarrant County in 2016 as a “spike” that indicates a systemic and ongoing problem with TAD’s operations. There was a problem but it was with 2015 numbers being too low rather than 2016 protest numbers being too high.

The causes of the 2015 numbers being too low were peculiar to that year and were remedied before and during the 2016 appraisal cycle.

As said and illustrated in Finding 2 above, the number of protests for ALL CATEGORIES OF PROPERTY and for CATEGORY A – SINGLE-FAMILY RESIDENTIAL PROPERTIES in 2015 were atypically low, both in comparison to past and subsequent years’ numbers in Tarrant County and in comparison to the four other largest counties.

The Comptroller found TAD’s 2015 values to be atypically low – that is, below the market values determined by the Comptroller’s sample appraisals. That resulted in TAD’s Final Property Value Study Results for 2015 being “outside confidence interval” for properties in most or all school districts for the first and only time in TAD’s history.¹³

Just as I believe that rising property tax valuations and rising property taxes are most likely the main drivers of rising protests numbers, I believe that TAD’s overall values being more or less “flat” in 2015 is the most likely reason for the drop in the number of protests that year.

¹¹ <https://comptroller.texas.gov/data/property-tax/pvs/2017f/2200000001A.php> (2017 PVS - final)

¹² <https://comptroller.texas.gov/auto-data/PT2/PVS/2019F/2200000001A.php> (2019 PVS - final)

¹³ <https://comptroller.texas.gov/data/property-tax/pvs/2015f/2200000001A.php> (2015 PVS - final)

The main reason for TAD's overall values remaining "flat" in 2015 – not keeping up with the rising real estate market -- was our temporarily suspending deed entry while "going live" to our new computer assisted mass appraisal (CAMA) system¹⁴. "Deed entry" is TAD's process of changing its appraisal records listings of ownerships and property descriptions to reflect changes that come to us in deeds and plats filed with the County Clerk.¹⁵ In our then-new CAMA system, new sales price data could not be entered until such ownership and property description changes were made. Consequently, during the three-month suspension of deed entry, current sales prices were not entered and could not be readily used so TAD's appraisers had to rely on data in the legacy software system for sales in 2014 and earlier. Resumption of deed entry and completion of the go-live process brought up to date TAD's CAMA database entries for ownership, property description, and sales data.

The Comptroller's follow-up PVS in 2016 concluded that TAD's values had risen to "within confidence interval".¹⁶ In other words, based on the Comptroller's independent sampling and appraisal, TAD's 2016 test values were again within 95% and 105% of fair market value.

- 5) Senator Nelson also asked about "troubles with software that were cited in a recent audit". I assume that she refers to the Aumentum Independent Verification and Validation Procedures: Results that Weaver & Tidwell, L.L.P. ("Weaver") provided to the Tarrant Appraisal District Board of Directors in December 2016. That retrospective report addressed a variety of process and product deficiencies. In response to and in most cases, prior to Weaver delivering its final report, TAD took action to formally initiate solutions, including vigorous diagnostic and remedial measures to correct issues associated with implementation and first year operation of the CAMA system. Those efforts were largely successful as indicated, for example, by TAD's producing appraisal values found by PVS to have stabilized "within confidence interval" for 2016 and all subsequent years. As was to be expected with a move from a 30+ year old legacy system, some issues remained and were addressed.

TAD continues to engage with its vendor and external and internal stakeholders to improve and extend software functionality and to cure any functional and technical defects as they are identified.

¹⁴ TAD converted from its 30+ year old legacy system in 2013-2014. Go-live was in October 2014.

¹⁵ TAD typically receives about 8,000 such transaction per month.

¹⁶ <https://comptroller.texas.gov/data/property-tax/pvs/2016f/2202209191F.php> (2016 PVS - final)

- 6) Senator Nelson also welcomed suggestions for statutory changes. TAD actively participates in and supports the Texas Association of Appraisal Districts (“TAAD”)¹⁷ and its legislative priorities set out in Exhibit 3.

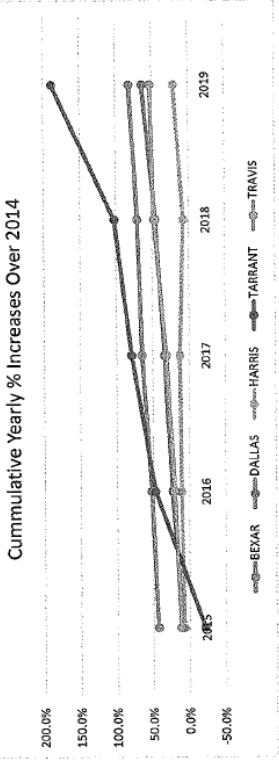
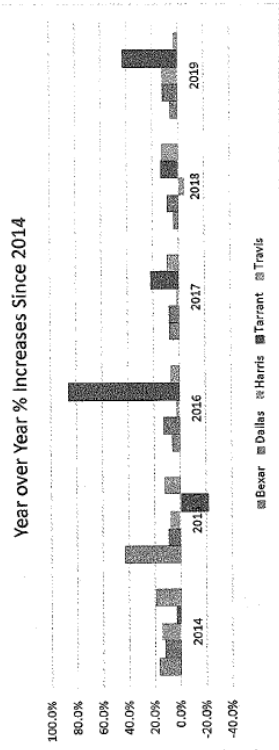


Jeff Law, Executive Director/Chief Appraiser
Tarrant Appraisal District

¹⁷ TAD’s ongoing involvement and support includes Jeff Craig, TAD’s Director of Administration, currently serving as President and Jeff Law, TAD’s Executive Director/Chief Appraiser, currently serving on the Legislative Committee.

STATEWIDE APPRIASAL PROTESTS BY LARGE URBAN COUNTY

YEAR	BEXAR COUNTY		DALLAS COUNTY		HARRIS COUNTY		TARRANT COUNTY		TRAVIS COUNTY	
	Tot. Protests	% Y-Y Inc.	Tot. Protests	% over 2014	Tot. Protests	% over 2014	Tot. Protests	% over 2014	Tot. Protests	% Y-Y Inc.
2013	55,064		84,402		306,962		70,000		80,447	
2014	64,297	16.8%	94,713	12.2%	351,877	14.6%	72,000	2.9%	96,371	19.8%
2015	92,365	43.7%	103,770	9.6%	378,765	7.6%	57,000	-20.8%	107,977	12.0%
2016	98,046	52.5%	117,271	23.8%	388,828	10.5%	106,000	47.2%	115,733	20.1%
2017	105,815	64.6%	126,967	34.1%	395,763	12.5%	129,000	79.2%	126,425	9.2%
2018	109,991	71.1%	138,285	46.0%	376,144	6.9%	146,000	102.8%	142,812	48.2%
2019	117,030	82.0%	155,336	64.0%	422,147	20.0%	208,000	188.9%	147,039	52.6%
Increase over 2015		26.7%		49.7%		11.5%		264.9%		36.2%
Increase over 2014		82.0%		64.0%		20.0%		188.9%		52.6%



Compiled by Rich DeOtte
2/13/2020
for TAD Board of Directors

EXHIBIT 1

Bexar County

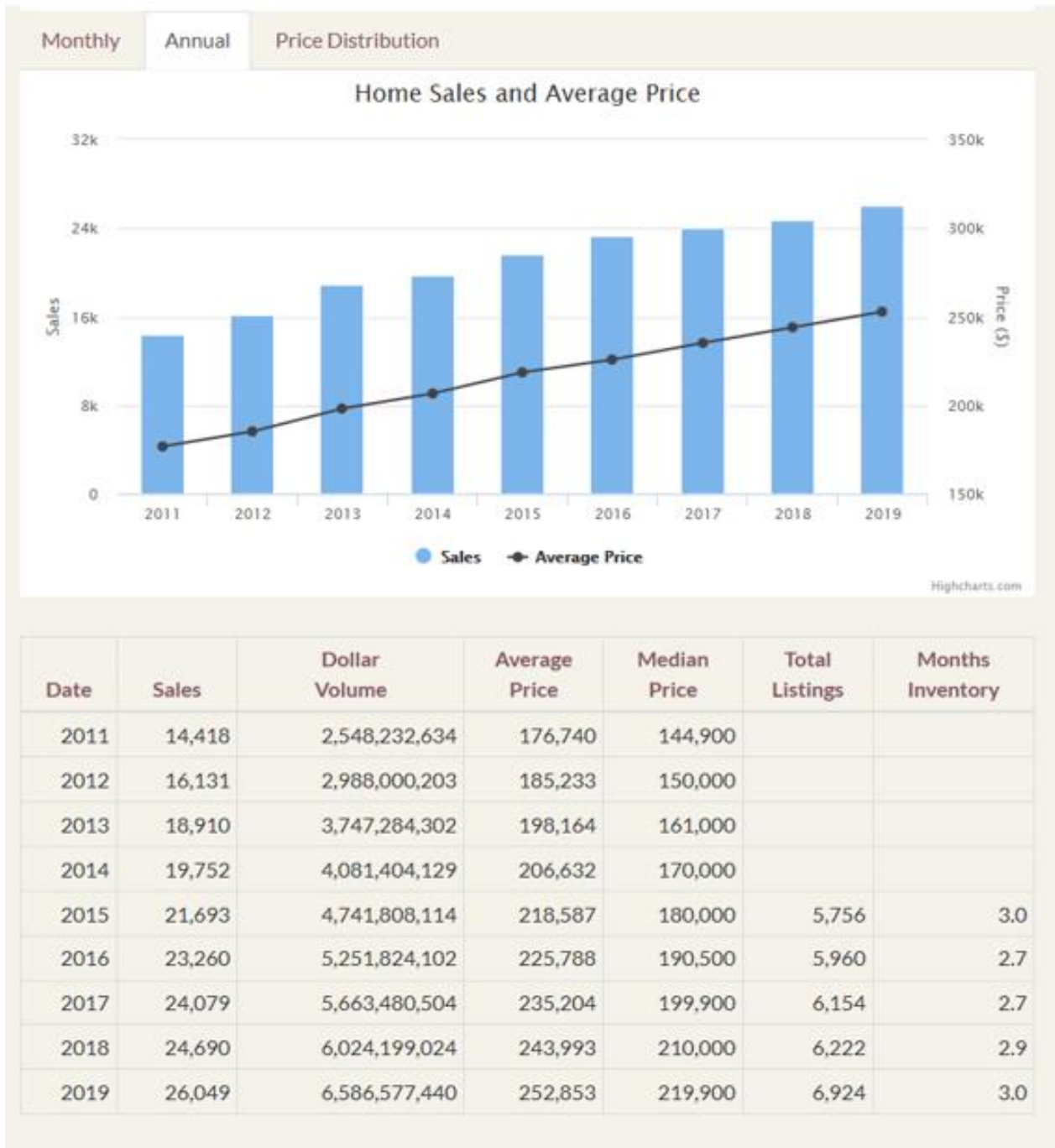


EXHIBIT 2 – Page 1 of 5

Dallas County



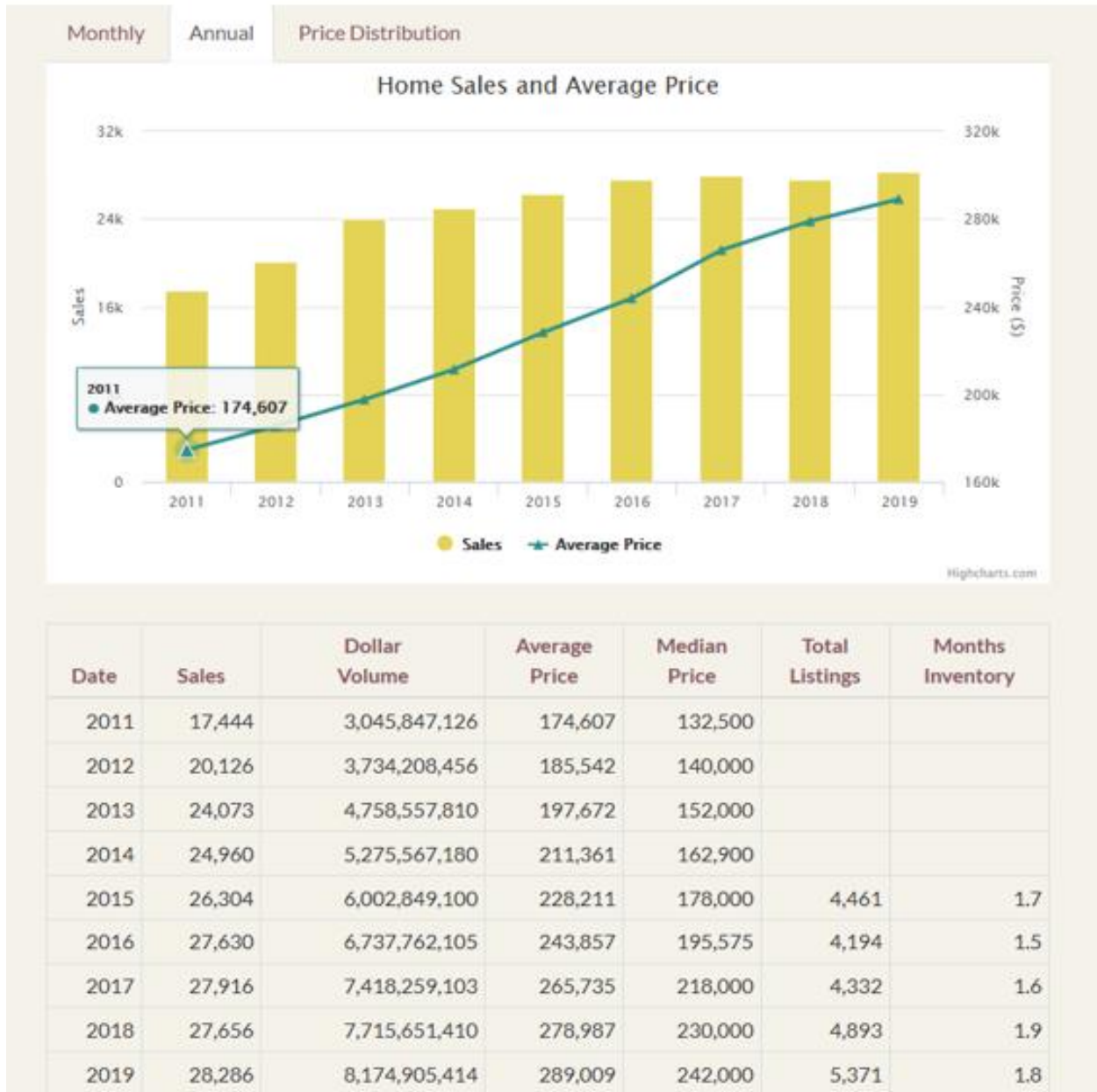
EXHIBIT 2 – Page 2 of 5

Harris County



EXHIBIT 2 – Page 3 of 5

Tarrant County



Travis County



EXHIBIT 2 – Page 5 of 5



Texas Association of Appraisal Districts

7700 Chevy Chase Drive, Building One, Suite 425 Austin, Texas 78752-1558 512/467-0402 FAX: 512/452-0427

TEXAS ASSOCIATION OF APPRAISAL DISTRICTS Legislative Priorities for the 87th Legislative Session

The TAAD Legislative Committee is committed to working with our members and the members of the Legislature for the betterment of the property tax appraisal process across the State of Texas. Below is a short list of the issues the committee has identified as being important to all CADs and to the appraisal process in general. These are the specific items on which TAAD will actively pursue legislative changes during the 87th session.

Senate Bill 2 Transparency Implementation – SB2 of the 86th Legislature made great progress in transparency by creating the property tax database and ultimately removing the estimate of taxes from the 25.19 appraisal notice. TAAD will work with the 87th Legislature to improve the transparency portion of SB2 by looking for alternative means of notifying the public of the property tax database outside of the costly additional August 7th notice that is currently required. Recommendations will be made to improve the timing of the notifications to allow the greatest impact of the database for those property owners who visit the website. An effort will be made to standardize the naming convention of the website and have one centralized location to serve as a “landing page” where property owners will find links to each individual county websites. TAAD’s goal is to ensure the successful onboarding of the property tax database in the most effective and efficient manner.

Continuation of Alternatives to In-Person ARB hearings – ARB’s were faced with many logistical challenges in 2020 due to COVID-19 safety concerns. ARB’s across the state adjusted their hearing processes to include remote hearings via videoconferencing or telephone conferencing. The Dallas ARB implemented a single member ARB panel to allow a property owner who agreed to this process to have a hearing before one member of the ARB. TAAD feels these practices were extremely beneficial in providing a timely appraisal roll and will seek legislation to allow these practices to continue outside of a disaster declaration with owner/agent consent. We will also ask the legislature to pass legislation allowing for mandatory remote hearings in the event of a disaster.

Employment Status of ARB Members – There has been an increase of ARB members filing for unemployment status during the “off-season” and a recent case at the Texas Supreme Court ruled that ARB members are indeed employees of the appraisal district. TAAD will work on legislation that will clarify that the ARB is an independent board and not employed by the appraisal district.

Oppose Legislation that Politicizes the Appraisal Process - Many legislators have made it part of their campaign to introduce legislation to make chief appraisers, board of directors, or appraisal review board members elected positions. TAAD will oppose any legislation that has the potential of interjecting politics into the appraisal process and will work to educate members of the legislature on the negative effects this would cause.

The TAAD Legislative Committee will monitor all property tax related bills during the session and focus efforts not only on the items on this list, but will also work with other stakeholders to ensure any new legislation filed is in the best interest of fairness in the property tax system, specifically the appraisal of property.

Adopted November 2020

EXHIBIT 3

November 6, 2020

Ref: Ad Valorem Protest Review Services Request for Qualifications

Dear Respondent:

The Tarrant Appraisal District (TAD) will require the services of an individual/firm to provide the referenced services. Enclosed is a copy of the Request for Qualifications.

If you wish to respond to this RFQ, please provide TAD with the following:

- A) ONE (1) MANUALLY SIGNED ORIGINAL. Two (2) HARD COPIES AND ONE (1) EXACT COPY ON USB DRIVES (in .pdf format excluding your financials) of your response, unless additional copies are otherwise requested in the Request for Qualifications, specifically stating your interest and any other specific information or statements called for in the enclosed Request for Qualifications.
- B) Complete information about your firm and staff qualifications.
- C) A list of projects which indicate specific background and experience in the program area being considered.
- D) A list of proposed rates, fees or charges, and other detailed cost proposal or cost breakdown information.

Any questions regarding this RFQ should be submitted via email ONLY to Jeff Craig at: JCraig@TAD.org no later than **5 PM Friday, November 20, 2020**. The answers to the questions received will be distributed in the form of an addendum shortly thereafter.

If any addenda are issued to this RFQ, a good faith attempt will be made to deliver a copy to each of those Respondents who, according to the records of TAD, has requested a copy of this RFQ and will be posted on TAD's website www.tad.org/about/procurement/. However, prior to submitting a response, it is the responsibility of the Respondent to contact the Tarrant Appraisal District as JCraig@TAD.org to determine if addenda were issued and, if so, to obtain such addenda for attachment to their response.

Your response must be received no later than **2 PM Tuesday, December 1, 2020**, and directed to:

Tarrant Appraisal District – Ad Valorem Protest Review Services RFQ
Attn: Jeff Craig, Director of Administration
2500 Handley-Ederville Rd
Fort Worth, TX 76118

Your package/response must be date and time stamped upon receipt. If it “appears” in our offices after the deadline and there is no date/time stamp, it will be rejected.

Yours Very Truly,

Jeff Craig



Request for Qualifications

Ad Valorem Protest Review Services

November 6, 2020

Tarrant Appraisal District
2500 Handley-Ederville Rd
Fort Worth, TX 76118

Responses Due By or Before 2:00 p.m., 12/1/2020

REQUEST FOR QUALIFICATIONS

Ad Valorem Protest Review Services

SECTION 1

Specific Information Regarding this RFQ

1.1 Introduction

The Tarrant Appraisal District (“TAD”) seeks responses from qualified Respondents interested in providing the services as described in Section 1.2 of this RFQ.

TAD is responsible for appraising all real and business personal property within Tarrant County according to the requirements of the Texas Property Tax Code (“Code”) and the Uniform Standards of Professional Appraisal Practices (“USPAP”). TAD seeks assistance in examining statistics for one aspect of the operations of the five largest appraisal districts in Texas and the appraisal review boards for each of them.

1.2 Scope of Services

Tarrant Appraisal District invites responses from candidates in the private sector who are qualified to perform the work described below. In summary, the work to be performed is objectively quantifying and comparing certain aspects of property tax operations in the five largest appraisal districts in Texas and the appraisal review boards for each of them for the past five years:

APPRAISAL DISTRICTS FOR THESE COUNTIES

- Bexar
- Dallas
- Harris
- Tarrant
- Travis

- TAX YEARS

- 2015
- 2016
- 2017
- 2018
- 2019

WORK TO BE PERFORMED

- 1) For each appraisal district and the appraisal review board for each of them, collect the following statistics for each tax year:
 - a. total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for all combined categories of property appraised by the appraisal district;
 - b. total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for the largest single category of property

- (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district;
- c. total number of orders determining protest issued by each appraisal review board for all combined categories of property appraised by the appraisal district;
 - d. total number of orders determining protest issued by each appraisal review board for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district;
 - e. total number of parcels/accounts appraised by the appraisal district for all combined categories of property appraised by the appraisal district; and
 - f. total number of parcels/accounts appraised by the appraisal district for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district.
- 2) For each appraisal district and the appraisal review board for each of them, compute the following comparisons for each tax year:
- a. total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for all combined categories of property appraised by the appraisal district compared to total number of parcels/accounts appraised by the appraisal district for all combined categories of property appraised by the appraisal district;
 - b. total number of orders determining protest issued by each appraisal review board for all combined categories of property appraised by the appraisal district compared to total number of parcels/accounts appraised by the appraisal district for all combined categories of property appraised by the appraisal district;
 - c. total number of orders determining protest issued by each appraisal review board for all combined categories of property appraised by the appraisal district compared to total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for all combined categories of property appraised by the appraisal district;
 - d. total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district compared to total number of parcels/accounts appraised by the appraisal district for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district;
 - e. total number of orders determining protest issued by each appraisal review board for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district compared to total number of parcels/accounts appraised by the appraisal district for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district;
 - f. total number of orders determining protest issued by each appraisal review board for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district compared to total number of notices of protest that property owners (directly or through designated agents) filed with the appraisal review board for the largest single category of property (other than oil, gas, minerals, and other sub-surface interests) appraised by the appraisal district; and

- g. other comparisons that TAD may identify as being necessary or helpful to identify and analyze significant similarities, differences, changes, and trends, among the five appraisal districts over tax years 2015 through 2019, in the volume and rates of parcels/accounts appraised, notices of protest filed' and orders determining protest issued.
- 3) Analyze the resulting statistics and comparisons.
 - 4) Compile the resulting statistics and comparisons in charts, graphs, and text to illustrate significant similarities, differences, changes, and trends -- among the five appraisal districts over tax years 2015 through 2019 -- in volume and rates of parcels/accounts appraised, notices of protest filed, and orders determining protest issued and your analysis of those significant similarities, differences, changes, and trends.

DEFINITIONS AND INSTRUCTIONS

- 1) "Tax year", "appraisal district", "appraisal review board", "notice of protest", and "order [determining protest]" have the meanings provided in Sections 1.04 (13), 6.01, 6.41, 41.44, and 41.47, respectively, of the Texas Property Tax Code.
- 2) "Parcel" has the meaning with which it is used in Chapter 25 and elsewhere in the Code to refer to a discrete item of property that is listed in the appraisal records and appraisal rolls of an appraisal district. TAD and other appraisal districts routinely use "parcel" and the colloquial term "account" interchangeably. As used here the terms are synonymous.
- 3) As used here, "notice of protest" refers to the combination of all grounds of protest related to a single parcel/account for a given tax year. In other words, the multiple grounds of protest are not counted separately. On the other hand, in a single document protesting multiple parcels/accounts, concerns about each parcel/account are to be counted as a single notice of protest for each tax year about which the notice applies.
- 4) "Category" refers to the categorization of property for property tax purposes that is published by the Comptroller of Public Accounts of the State of Texas.
- 5) Numbers of parcels/accounts appraised, notices of protest filed, and orders determining protests issued must be collected from sources that are the kind that administrators, appraisers and other professionals in the property tax appraisal field would reasonably rely on. Sources must be fully and accurately cited.
- 6) Attached for your further information is the document that initially sparked TAD's interest in looking closer at and doing more detailed work with the data elements specified above.

1.3 Term of Agreement

The initial term of agreement will commence upon execution of the Contract with a written purchase order. The length will be determined upon analysis of responses. The Contract is subject to early termination as set forth elsewhere in this RFQ.

1.4 Minimum Requirements for Respondents

Individual/Firm must satisfy the following mandatory minimum requirements in order to have their responses evaluated. By submitting a response, warrant and represents that it satisfies these requirements. Failure to meet these requirements will result in the response not being evaluated and being rejected as non-responsive:

Respondent must have at least three (3) years of experience in the areas of work requested to be provided in this section and provide a minimum of three (3) references, where Respondent has provided similar services. The preference is that the references be from Texas County clients. TAD reserves the right to contact all references provided and any other known customers.

1.5 Documents Available for Inspection (if applicable)

TBD

1.6 Pre-Proposal Meeting

There is not a pre-proposal meeting scheduled for this RFQ.

1.7 Response Due Date

The deadline for submitting responses to this RFQ is **Tuesday December 1, 2020 at 2:00 pm**. Please see Section 2.3 for more details.

1.8 Response Delivery Location

Responses must be delivered to the following location:

Tarrant Appraisal District – **Ad Valorem Protest Review Services RFQ**
Attn: Jeff Craig, Director of Administration
2500 Handley-Ederville Rd.
Fort Worth, TX 76118

1.9 Response Opening.

All Responses received shall be publicly announced and recorded at 2:00 PM on the Response Due Date at the Response Delivery Location (See Section 1.7 and 1.8 above). Only the name of the company or individual submitting a response will be read. Due to the Covid-19 pandemic, safety protocols may not allow respondents to be physically present for the opening of bids. If practical, a method to attend virtually will be devised and all timely respondents will be notified of how to access.

1.10 Contact Person

Buyer's Contact Person for this RFQ is:

Jeff Craig,
Director of Administration
JCraig@TAD.org

Please refer to Section 2.7 for further information on who may and may not be contacted regarding this RFQ.

1.11 Questions and Requests for Amendments

Any questions, requests for information, or requests for amendments to this RFQ must be submitted via email ONLY to Jeff Craig at JCraig@TAD.org no later than **5:00 pm, Friday, November 20, 2020** in accordance with Section 2.1 of this RFQ.

Section 2 General Instructions

2.1 Questions and Requests for Amendment to RFQ

If a Respondent (I) has questions about the RFQ, (II) finds discrepancies, omissions, or ambiguities in the RFQ, or (III) believes any term or condition of the RFQ is unreasonable, Respondent should request an amendment to the RFQ. The request should reference the RFQ section at issue and include any specific language that Respondent recommends using.

All requests for amendment must be submitted to the Contact Person in writing (via email) and, unless otherwise specified in Section 1.10 of the RFQ, be received by the Contact Person at least ten (10) calendar days before the Response Due Date. Questions and requests for amendments directed to the Contact Person shall not constitute a formal protest of the RFQ. Failure to request an interpretation or change will be considered evidence that Respondent understands and agrees to the provisions of the RFQ.

The posting of a written amendment (www.tad.org) is the only official method by which interpretations, clarifications, changes, or additional information will be given by TAD prior to the opening of Responses. Any other interpretation, clarification, change, or information will have no legal effect.

TAD reserves the right to amend, cancel, or reissue the RFQ at its discretion. This included the right to change the Response Due Date and the Contract award date.

2.2 Format/Content of Responses

- A. If a Response Format is specified in the RFQ, Respondents should follow that format in Attachment A.
- B. Responses should be prepared simply and economically, providing a straight forward, concise description of Respondent's ability to provide services sought by the RFQ. Bindings and covers will be Respondent's discretion.
- C. When responding to specific questions, please reprint each question in its entirety before the response.
- D. All corrections must be initialed.
- E. Responses shall be limited to a page size of 8 1/2" x 11". Font size less than 11-point is discouraged. The Response shall be indexed and all pages sequentially numbered.
- F. Except as may be specifically requested in the Response Format, Respondent may not impose any additional terms or conditions to any aspect of the RFQ. TAD objects to and shall not be required to consider any additional terms or conditions submitted by Respondent, including any appearing in the Response. In submitting a Response, Respondent agrees that any additional terms or conditions shall have no force or effect. Any failure to comply with the terms and conditions of the RFQ, including those specifying information that must be submitted with a Response, may result in rejection of the Response. Respondent must follow the process set forth in Section 2.1 ("Questions and Request for Amendments").
- G. Price of offerings shall be inclusive of ALL (not to exceed) costs (including but not limited to administrative cost for submission of all required paperwork on TAD's behalf and any other costs) and will be the only compensation given to Respondent for the required services herein.
- H. All prices submitted under the RFQ shall be indelible. Corrections must be by lineout of the incorrect figures, writing in of correct figures, and initialing of the corrections by the originator. Erasure of corrected bids will be considered non-responsive for the corrected item(s) only, and may render the entire Response as nonresponsive.

- I. Failure to sign any form requiring a signature may be grounds for rejecting a Response.

2.3 Submission of Responses

- A. The location and deadline for submitting Responses is set forth in Section 1 of the RFQ. Respondents are fully responsible for meeting these requirements. Reliance upon mail or public carrier is at Respondent's risk. Late responses will not be considered.
- B. Respondent shall submit:
 - a. One (1) original signed version of its Response clearly marked as "Original". The Response must be signed by an officer or employee having legal authority to legally bind Respondent.
 - b. Two (2) hard copy of the entire Response.
 - c. One (1) scanned copy (in .pdf format) of entire Response on a USB Drive; large files may be scanned as several separate .pdf files.

All copies are to be placed in a sealed package. The outside must be marked with (1) the RFQ Title, and (2) Respondent's name, address, contact person, and telephone number.

It is the sole responsibility of each Respondent to assure all copies are EXACT duplicates of the original Response.

2.4 Evaluation of Responses

- A. TAD will determine the qualifications, interest, and availability of Respondent s by reviewing all Responses and, when deemed necessary in the sole discretion of Buyer, by conducting formal interviews of selected Respondent s that are determined to be the best qualified based upon evaluations of the Response.
- B. The determination of which Respondent s are "best qualified" will be based upon the criteria set forth in the RFQ.
- C. Before making an award, Buyer reserves the right to seek clarifications, revisions, and information it deems necessary for the proper evaluation of Responses. Failure to provide any requested clarification, revisions, or information may result in rejection of the Response.
- D. Buyer reserves the right to accept or reject any and all Responses, or separable portions, thereof, and to waive any minor irregularity, technicality, or omission if Buyer determines that doing so will serve Buyer's best interest. Buyer may reject any Response not submitted in the manner specified by the RFQ.

2.5 Negotiation and Award of Contract

- A. Generally, Buyer will negotiate first with the highest ranked Respondent. If an agreement cannot be reached with the highest ranked Respondent, Buyer reserves the right to negotiate and recommend award to the next highest ranked Respondent or subsequent Respondent (s) until an agreement is reached.
- B. Buyer may make an award within ninety (90) days after the date of the Response s are due, during which period the Response s shall remain firm and shall not be withdrawn. Any Response s that expresses a shorter duration may, in Buyer's sole discretion, be accepted or rejected. If award is not made within ninety (90) days, the Response shall remain firm until either the Contract is awarded or the Buyer received from Respondent written notice that the Response is withdrawn. Buyer will not accept an amended Response after the date and time Response s are due.

- C. Except as may otherwise be expressly set forth in the RFQ, Buyer intends to award one contract, but reserves the right to enter into a contract with multiple Respondent s or to reject all Response s.

2.6 Terms of Agreement

After award to the successful Respondent, Buyer and Respondent will enter into a written agreement (the “Contract”) incorporating the terms of the RFQ, the successful Response, and the other terms and conditions as may be agreed to between the parties. To the extent the Response contains exceptions to or modifications of the RFQ, such exceptions or modifications are stricken unless Buyer affirmatively accepts the exceptions or modifications in the Contract. Buyer will not be obligated to pay Respondent for the RFQ services until the Contract is signed by both parties and payment will be made per the specific terms of the final agreement. Buyer retains the right to reject all bids and/or amend its notice of award at any time prior to the full execution of the Contract.

If the successful Respondent fails to perform the Services as agreed, Buyer reserves the right to (1) issue a new solicitation for the Services; (2) reopen the RFQ for the purpose of negotiating and awarding a second contract to another Respondent in accordance with the criteria and processes set forth herein; and/or (iii) take such other actions permitted by law.

2.7 Ex-Parte Communications

Communications regarding the RFQ by a potential respondent, service provider, bidder, lobbyist, or consultant to an employee or official of a tax unit in Tarrant County or TAD staff or Board of Directors are prohibited.

These prohibitions on ex-parte communications **do not apply** to the following:

- Communications regarding the RFQ to the Director of Administration provided the communication is limited strictly to matters of process or procedure already contained in the RFQ.

The period for these prohibitions commences upon the advertisement of the RFQ and terminates after the contract is signed

2.8 Cost of Developing RFQ Responses

All costs related to the preparation of Responses and any related activities are the sole responsibility of Respondent. Buyer assumes no liability for any costs incurred by Respondent s throughout the entire selection process.

2.9 Response Ownership

All Response s, including attachments, supplementary materials, addenda, etc., shall become property of Buyer and shall not be returned to Respondent. Buyer will have the right to use any and all ideas or adaptation of ideas presented in any Response. Acceptance or rejection of a Response shall not affect this right.

2.10 Respondent Representations

In submitting a Response, Respondent understands, represents, and acknowledges the following (if Respondent cannot so certify to any of the following, Respondent shall submit with its Response a written explanation of why it cannot do so).

- The Response is submitted in good faith and without any prior or future consultation or agreement with any other respondent or potential respondent;
- To the best of the knowledge of the person signing the Response, neither this Respondent, its affiliates, subsidiaries, owners, parties, principals or officers:
 - Is currently under investigation by any governmental authority for conspiracy or collusions with respect to bidding on any public contract;
 - Is currently under suspension or debarment by any governmental authority in the United States;
- Respondent has read and understands the RFQ terms and conditions, and the Response is submitted in conformance with those terms and conditions.
- All representations made by Respondent to Buyer in connection with the RFQ have been made after a diligent inquiry of its employees and agents responsible for preparing, approving, or submitting the Response.
- Respondent shall indemnify, defend, and hold harmless Buyer and its employees against any cost, damage, or expense which may be incurred or be caused by any error in the Response.
- All information provided by, and representations made by, Respondent are material and important and may be relied upon by Buyer in awarding the Contract.

Section 3

General Terms and Conditions of Agreement

These terms and conditions are, by reference, incorporated into and made a part of the Tarrant Appraisal District (TAD) November 6, 2020 “**Ad Valorem Protest Review Services**” Request For Qualifications” (RFQ) and any and all subsequent contract awards and purchase orders.

3.1 Late RFQ Submissions

RFQ’s received by the TAD after the submission deadline will be considered void and unacceptable and will be returned to the Respondent unopened. The TAD is not responsible for lateness or non-delivery of mail, carrier, etc.

3.2 Altering RFQ Submissions

RFQ’s cannot be altered or amended after the submission deadline. Any interlineations, alteration, or erasure made before opening must be initialed by the signer of the RFQ guaranteeing authenticity.

3.3 Withdrawal of RFQ

RFQ submissions may not be withdrawn or cancelled by the individual/firm without the TAD’s permission for a period of ninety (90) days following the date designated for the receipt of RFQ submissions and the individual/firm so agrees upon submittal of its RFQ submittal.

3.4 Funding

Funds for payment have been provided through the TAD budget approved by its Board of Directors for this fiscal year only. Texas state statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise after the end of the current fiscal year shall be subject to budget approval.

3.5 Sales Tax

The TAD is exempt from payment of Texas sales tax and federal excise tax.

3.6 Contract

This RFQ, when properly accepted or approved by the TAD, will constitute a contract equally binding between the successful individual/firm and the TAD. No different or additional terms will become a part of this contract except upon written changes agreed upon by the parties.

3.7 Independent Contractor Status

The selected individual/firm acknowledges that it is an independent contractor, and, as such, understands that the TAD is not liable to the selected individual/firm for any benefits or coverages as provided by the workers’ compensation and/or unemployment compensation laws of the State of Texas and that anyone employed by the selected individual/firm shall not be considered an employee of the TAD for purposes of workers’ compensation and/or unemployment compensation coverage. Furthermore, the selected individual/firm declares, as an independent contractor, that it has been and will be free from any control or direction by the TAD over its performance of the services and provision of the work products covered by this contract.

3.8 Changes

No oral statement of any person shall modify or otherwise change or affect the terms, conditions, or requirements stated in the resulting contract. All changes to this contract shall be made in writing as agreed upon by the parties.

3.9 Ethics

The respondent shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of the TAD.

3.10 Lawful Compliance

The selected individual/firm must comply with all relevant federal, state, county and local laws in the performance of the services and provision of the products provided herewith.

3.11 TAD Indemnification

The selected individual/firm shall defend, indemnify, and hold harmless the TAD and all of its officers, agents, and employees from all suits, actions, or other claims of any character, name, or description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the selected individual/firm, and/or any of the selected individual/firm's agents, employees, subcontractors, or suppliers in the execution of, or performance under, any contract award and/or purchase order. The selected individual/firm indemnifies and will indemnify and save harmless the TAD from liability, claim, or demand on its part and its agents, servants, customers, and/or employees whether such liability, claim, or demand arise from event or casualty happening on or within the TAD premises themselves or happening upon or in any halls, entrances, stairways, driveways, parking areas, or approaches of or to the TAD property. The selected individual/firm shall pay any judgment with costs which may be obtained against the TAD growing out of any such injury or damages.

3.12 Wages

The selected individual/firm shall pay or cause to be paid, without cost or expense to the TAD, all such wages and benefits to its employees as required by state and federal law.

3.13 Payment

Payment to Respondent for Services shall be made on a mutually agreed upon method. Payment to the selected individual/firm shall be made subsequent to the TAD's receipt and acceptance of the specified work products and within 30 days following the TAD receipt of an accurate invoice for same. Periodic progress payments may be made, subject to verifiable evidence or documentation that indicated work and progress have actually occurred and that such payment is warranted. Any such progress payments may be subject to withholding 10% retainage, with accumulated retainage amounts being paid upon the TAD receipt and acceptance of all specified work products for a particular tax year. Payment for authorized as-needed lawsuit-related services shall be made within 30 days of TAD receipt of accurate invoices for same.

3.14 Termination of Contract

The TAD reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of the TAD in the event of breach or default of this contract. In the event the selected individual/firm shall fail to perform, keep, or observe any of the requirements, terms or conditions of this contract, the TAD may give the selected individual/firm written notice of such default and, if same is not remedied to the satisfaction and approval of the TAD

within two (2) working days of receipt of such notice, default may be declared and all the selected individual/firm's rights shall terminate.

3.15 Assignment

The selected individual/firm shall not assign, transfer, sell, or convey this contract, in whole or in part, without the prior written consent of the TAD.

3.16 Venue

This contract will be governed and construed according to the laws of the State of Texas and is performable in Tarrant County, Texas.

3.17 Silence of Specifications

The apparent silence of the RFQ (including these terms and conditions and the cost submission form) as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the RFQ shall be made on the basis of this statement.

3.18 Provision of Services

Respondent shall provide Buyer with all of the services and deliverables described in the RFQ, the Response and the resulting Contract (collectively, the "Services"). If any services, functions or responsibilities are not specifically described in the RFQ, the Response or the resulting Contract but are necessary for the proper performance and provision of the Services, they shall be deemed to be implied by and included within the scope of the Services to the same extent and in the same manner as if specifically described herein.

3.19 Buyer's Right to Make Changes

Buyer may unilaterally require, by written order, changes altering, adding to, or deducting from the Services ("Changes"), provided that such Changes are within the general scope of the Contract. Buyer will make an equitable adjustment in the Contract price or the delivery date if the Change materially affects the cost or time of performance. Such equitable adjustments require the written consent of Respondent, which shall not be unreasonably withheld. The Parties will cooperate with each other in good faith in discussing the scope and nature of the Change, the availability of Respondent personnel, the expertise and resources to provide such Change, and the time period in which such Change will be implemented.

3.20 Service Warranties

Respondent warrants that the Services shall be performed and delivered in a professional, first-class manner in accordance with the Contract and the standards prevailing in the industry. Respondent shall also undertake the following actions without additional consideration during the term of the Contract and for one year thereafter: (1) promptly making necessary revisions or corrections to resolve any errors and omissions on the part of Respondent; and (ii) conferring with Buyer for the purpose of interpreting any of the Services or information furnished. Acceptance of the Services by Buyer shall not relieve Respondent of these responsibilities. The warranties and covenants in this paragraph will extend to all subcontractors as well.

3.21 Buyer Will Assist Respondent

At Respondent's request, Buyer will provide reasonable assistance and cooperation to Respondent, including the supply of any data and information necessary for Respondent to provide the

Services. Buyer will also designate a person(s) who will, on behalf of Buyer, work with Respondent and administer the Contract in accordance with its terms.

3.22 Location Requirements for Services

Unless otherwise stated in the RFQ on the Response, all of the Services must be performed within the United States.

3.23 Use of Subcontractors: Flow –Down Provisions

Except to the extent the use of subcontractors is disclosed in the Response or consented to in writing by Buyer, Respondent shall not be allowed to subcontract or assign any of its duties and obligations hereunder. In all cases, Respondent will be responsible for the acts or omissions of its subcontractors. Respondent will ensure that all relevant contractual obligations will flow down to the subcontractors and will be incorporated into the subcontracts.

3.24 Meetings and Reports

Respondent must attend all meetings and public hearings relative to the Service where its presence is determined to be necessary and requested by Buyer and Respondent can reasonably schedule its appearance.

3.25 Loss of Data

If any Buyer data or record is lost or corrupted due to the negligence of Respondent or any of its subcontractors or agents, Respondent shall be responsible for correcting and recreating all production, test, acceptance, and training files or databases affected which are used in the provision of services, at no additional cost to the Customer in the manner and on the schedule set by Buyer. This remedy shall be in addition to any other remedy Buyer may be entitled to by law or the Contract.

3.26 Best Pricing for Comparable Services to Other Government Entities

Compensation for the Services shall be as set forth in the Contract. During the Contract term, if Respondent offers better pricing to other government entities for substantially the same or a smaller quantity of Services upon the same or similar terms of the Contract (“Better Pricing”), then the price under the Contract shall be immediately reduced to the better price. Buyer may require Respondent to certify on an annual basis that Better Pricing (as defined above) does not exist.

3.27 Buyer’s Right to Suspend Work

Buyer may in its sole discretion suspend any or all activities under the Contract by providing a written notice to Respondent at least five (5) days in advance that outlines the particulars of suspension. Within ninety (90) days of providing such notice, or within any longer period agreed to by Respondent, Buyer shall either (1) authorize the resumption of work, at which time activity shall resume, or (2) terminate the contract in accordance with the applicable termination provisions. Suspension of work shall not entitle Respondent to any additional compensation. The parties will reasonably amend any schedules relating to performance of the Services to reflect the suspension of work hereunder. Respondent shall not be entitled to receive compensation for any work it performs after being excused from providing it hereunder.

3.28 Buyer’s Remedies upon Respondent Default

Any one or more of the following events, if not cured within ten (10) calendar days after Respondent’s receipt of written notice thereof, shall constitute an “Event of Default” on the part of the Respondent: (1) Respondent fails to perform the Services within the time specified in the Contract or

any extension, (2) Respondent fails to maintain adequate progress, thus endangering performance of the Contract, (3) Respondent fails to honor any other material term of the Contract, or (4) Respondent fails to abide by any statutory, regulatory, or licensing requirement. Buyer may extend the 10-day cure period in its discretion.

In addition, the following shall constitute an immediate Event of Default with no right cure: (I) Respondent is found to have made a false representation.

Upon an "Event of Default" on the part of Respondent, Buyer will be entitled to terminate the Contract and pursue such other remedies available at law or equity, including the recovery of any re-procurement costs and delay damages. The rights and remedies available to Buyer under the Contract are distinct, separate, and cumulative remedies, and no one of them, whether or not exercised by a party, shall be deemed to be in exclusion of any other.

If, after termination, it is determined that Respondent was not in default, or that the default was excusable, the rights and obligations of the parties shall be the same as if the termination had been issued of the convenience.

3.29 Transition Services

At any time prior to the date the Contract expires or terminates for any reason (the "Termination Date"), Buyer may request Respondent to provide reasonable transition assistance services ("Transition Assistant"). Respondent shall provide such Transition Assistance until such time as Buyer notifies Respondent that Buyer no longer requires such Transition Assistance, but in no event for more than 190 days following the Termination Date.

Transition Assistance shall mean any services, functions, or responsibilities that are ordinarily or customarily provided to a purchaser to ensure that the services provided to that purchaser by a contractor are fully transitioned in a smooth and efficient manner to a new service provider (either Buyer itself or a third party contractor). Transition Assistance includes the development and implementation or a detailed transition plan. To the extent that Transition Assistance will involve third parties hired by Buyer, those third parties shall cooperate with Respondent in its provisions of Transition Assistance and sign any reasonable non-disclosure agreements required by Respondent.

Transition Assistance rendered before the Termination Date shall be provided at no additional cost to Buyer. Transition Assistance rendered after the Termination Date shall be provided at the rates negotiated by the parties prior to the rendering of such services, which rates shall not exceed the standard market rates that Respondent charges to government entities for comparable services; provided however, that if Buyer terminates the Contract because of a breach by Respondent, then (I) the Transition Assistance shall be provided at no cost to Buyer, and (ii) Buyer will be entitled to any other remedies available to it under law. Respondent may withhold Transition Assistance after the Termination Date if Buyer does not provide reasonable assurance that the charges for such Transition Assistance will be paid to Respondent in accordance with the invoicing and payment provisions of the Contract.

3.30 Force Majeure, Notice of Delay, and No Damages for Delay

Neither party shall be responsible for delays in performance if the delay was beyond that party's control (or the control of its employees, subcontractors, or agents). Respondent shall notify Buyer in writing of any such delay or potential delay and describe the cause of the delay either (1) within ten (10) calendar days after the cause that creates or will create the delay first arose, if Respondent could reasonably foresee that a delay could occur as a result, or (2) if delay is not reasonable foreseeable, within five (5) calendar days after the date Respondent first had reason to believe that a delay could result. Based upon such notice, Buyer will give Respondent a reasonable extension of time to perform; provided, however, that Buyer may elect to terminate the Contract in whole or in part if Buyer

determines, in its sole judgment, that such a delay will significantly impair the value of the Contract to Buyer. Providing notice in strict accordance with this paragraph is a condition precedent to such remedy. THE FOREGOING SHALL CONSTITUTE RESPONDENTS SOLE REMEDY OR EXCUSE WITH RESPECT TO DELAY. No claim for damages, other than for an extension of time, shall be asserted against Buyer. Respondent shall not be entitled to an increase in the Contract price or payment of any kind from Buyer for direct, indirect, consequential, impact or other costs, expenses or damages, including but not limited to costs of acceleration or inefficiency arising because of delay, disruption, interference, or hindrance from any cause whatsoever.

3.31 No Waiver

The delay or failure by a party to exercise or enforce any of its rights under the Contract shall not constitute or be deemed a waiver of that party's right thereafter to enforce those rights, nor shall any single or partial exercise of any such right preclude any other or further exercise thereof or the exercise of any other right. Unless otherwise agreed in writing, Buyer's payment for the Services shall not release Respondent of its obligations under the Contract and shall not be deemed a waiver of Buyer's right to insist upon strict performance hereof.

3.32 Security Procedures

Respondent and its employees, subcontractors and agents shall comply fully with all generally applicable security procedures of the United States, the State of Texas and Buyer in performance of the Contract. Buyer agrees that any security procedures imposed by Buyer specifically for the Contract will be reasonable and will not impose any unreasonable costs or hardships.

3.33 Restrictions on the Use or Disclosure of Buyer's Information

Respondent shall not use, copy or disclose to third parties, except in connection with performing the Services, any information obtained by Respondent or its agents, subcontractors or employees in the course of performing the Services, including, but not limited to, security procedures, business operations information, or commercial proprietary information in the possession of Buyer. At Buyer's request, all information furnished by Buyer will be returned to Buyer upon completion of the Services. Respondent shall not be required to keep confidential any information that has already been made publicly available through no fault of Respondent or that Respondent developed independently without relying on Buyer's information. To ensure confidentiality, Respondent shall take appropriate steps as to its employees, agents, and subcontractors, including the insertion of these restrictions in any subcontract agreement. The warranties of this paragraph shall survive the Contract.

3.34 Protection of Respondent's Trade Secrets and Other Confidential Information

Any specific information that Respondent claims to be a trade secret or otherwise exempt from the Texas Public Records Law must be clearly identified as such by Respondent on all copies furnished to Buyer. Buyer agrees to notify Respondent of any third party request to view such information, but it is Respondent's obligation to obtain a court order enjoining disclosure. If Respondent fails to obtain a court order enjoining disclosure within five (5) business days of Respondent's receiving notice of the request, Buyer may release the requested information. Such release shall be deemed for purposes of the Contract to be made with Respondent's consent and

will not be deemed to be a violation of law, including but not limited to laws concerning trade secrets, copy right or other intellectual property.

3.35 Warranty of Ability to Perform

Respondent warrants that (I) it is ready, willing and able to perform its obligations under the Contract, and (II) to the best of Respondent 's knowledge, there are no pending or threatened actions, proceedings, investigations or any other legal or financial conditions that would in any way prohibit, restrain, or diminish Respondent 's ability to satisfy its Contract obligations. Respondent shall immediately notify Buyer in writing if its ability to perform is compromised in any manner during the term of the Contract.

3.36 Warranty of Authority to Sign Contract

Each person signing the Contract warrants that he or she is duly authorized to do so and to bind the respective party to the Contract.

3.37 Certificate of Interested Parties (Form 1295)

The following information regarding Form 1295 Information applies ONLY to an awarded vendor.

The law states that a governmental entity may not enter into certain contracts with a non-exempt business entity unless the business entity submits a disclosure of interested parties to the governmental entity. By submitting a proposal in response to this solicitation, the Vendor agrees to comply with HB 1295, Government Code 2252.908. Vendor agrees to provide TAD's Purchasing Agent, and/or requesting department, the "Certificate of Interested Parties," Form 1295 as required, within ten (10) business days from notification of pending award, renewal, amended or extended contract.

The Filing Process:

1. Prior to award by TAD, Vendor will be required to log in to the Texas Ethics Commission, https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm and fill out the Electronic Filing Application.
2. Once submitted, the system will generate an electronic Form 1295 displaying a "Certificate Number." Vendor must print and complete Form 1295.
3. Within ten (10) business days from notification of pending award by the TAD Purchasing Agent, the completed Form 1295 must be submitted to TAD.
4. Vendor will need to repeat the process and obtain a separate Form 1295 each time they enter into a new contract, renew a contract or make modification, and/or amendments to a TAD contract.

Instruction and information are available at <https://www.ethics.state.tx.us/filinginfo/1295/> or you may call the Texas Ethics Commission at (512) 463-5800.

Conflict of Interest Disclosure Requirement

Pursuant to Chapter 176 of the Local Government Code, any person or agent of a person who contracts or seeks to contract for the sale or purchase of property, goods, or services with a local governmental entity (i.e. TAD) must disclose in the Questionnaire Form CIQ ("Questionnaire") the person's affiliation or

business relationship that might cause a conflict of interest with the local governmental entity. By law, the Questionnaire must be filed with TAD no later than seven days after the date the person begins contract discussions or negotiations with TAD, or submits an application or response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with TAD. Updated Questionnaires must be filed in conformance with Chapter 176.

A copy of the Questionnaire Form CIQ is available at <http://www.ethics.state.tx.us/forms/conflict>.

If you have any questions about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirement. An offense under Chapter 176 is a Class C misdemeanor.

NOTE: If you are not aware of a Conflict of Interest in any business relationship that you might have with TAD, state Vendor name in the # 1, use N/A in each of the areas on the form. However, a signature is required in the #7 box in all cases.

TAD Board members are Wendy Burgess, Rich DeOtte, Gary Losada, Joseph Martinez, Tony Pompa and Kathryn Wilemon. TAD's Chief Appraiser is Jeff Law.

3.39 Prohibition on Contracting With Companies That Boycott Israel

The individual/firm acknowledges that in accordance with Chapter 2270 of the Texas Government Code, TAD is prohibited from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The terms "boycott Israel" and "company" shall have the meanings ascribed to those terms in Section 808.001 of the Texas Government Code. By signing this contract, the individual/firm certifies that the individual/firm's authorized representative's signature provides written verification to TAD that the individual/firm: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. *Revised August 31, 2017*

3.40 Companies Engaged In Business With Iran, Sudan, Or Foreign Terrorist Organization.

Pursuant to Texas Government Code Chapter 2252, Subchapter F, Seller affirms that it is not identified on a list created by the Texas Comptroller of Public Accounts as a company known to have contracts with or provide supplies or services to a foreign terrorist organization.

3.41 Ownership and Licenses.

In accordance with Texas law, Respondent acknowledges and agrees that all local government records created or received in the transaction of official business or the creation or maintenance of which were paid for with public funds are declared to be public property and subject to the provisions of Chapter 201 of the Texas Local Government Code and Subchapter J, Chapter 441 of the Texas Government Code. Thus, no such local government records produced by or on the behalf of Respondent pursuant to this Contract shall be the subject of any copyright or proprietary claim by Respondent. The term "local government record" as used herein shall mean any document, paper, letter, book, map, photograph, sound or video recording, microfilm, magnetic tape, electronic medium, or other information recording medium, regardless of physical form or characteristic and regardless of whether public access to it is open or restricted under the laws of the state, created or received by local government or any of its officials or employees pursuant to law including an ordinance, or in the transaction of official business. Respondent acknowledges and agrees that all local government records, as described in herein, produced in the course of the work required by any contract awarded pursuant

to this RFQ will belong to and be the property of TAD. Respondent, if awarded this contract, will be required to turn over to TAD, all such records as required by said contract. Respondent, if awarded this contract, shall not, under any circumstances, release any records created during the course of performance of the contract to any entity without TAD's written permission, unless required to do so by a Court of competent jurisdiction. In accordance herewith, Respondent, if selected, agrees to comply with all applicable federal, state and local laws, rules and regulations governing documents and ownership, access and retention thereof.

3.42 Intellectual Property.

If selected, Respondent agrees to abide by the following regarding intellectual property rights:

Respondent shall pay all royalties and licensing fees. Respondent shall hold TAD harmless and indemnify TAD from the payment of any royalties, damages, losses or expenses including attorney's fees for suits, claims or otherwise, growing out of infringement or alleged infringement of copyrights, patents, materials and methods used in the project. It shall defend all suits for infringement of any Intellectual Property rights. Further, if Respondent has reason to believe that the design, service, process or product specified is an infringement of an Intellectual Property right, it shall promptly give such information to TAD.

Upon receipt of notification that a third party claims that the program(s), hardware or both the program(s) and the hardware infringe upon any United States patent or copyright, Respondent will immediately:

Either:

obtain, at Respondent's sole expense, the necessary license(s) or rights that would allow TAD to continue using the programs, hardware, or both the programs and hardware, as the case may be, or,

alter the programs, hardware, or both the programs and hardware so that the alleged infringement is eliminated, and

reimburse TAD for any expenses incurred by TAD to implement emergency backup measures if TAD is prevented from using the programs, hardware, or both the programs and hardware while the dispute is pending.

Respondent further agrees to:

assume the defense of any claim, suit, or proceeding brought against TAD for infringement of any United States patent or copyright arising from the use and/or sale of the equipment or software under this Agreement,

assume the expense of such defense, including costs of investigations, reasonable attorneys' fees, expert witness fees, damages, and any other litigation-related expenses, and indemnify TAD against any monetary damages and/or costs awarded in such suit;

Provided that:

Respondent is given sole and exclusive control of all negotiations relative to the settlement thereof, but that Respondent agrees to consult with the Attorney of TAD during such defense or negotiations and make good faith effort to avoid any position adverse to the interest of TAD,

the Software or the equipment is used by TAD in the form, state, or condition as delivered by Respondent or as modified without the permission of Respondent, so long as such modification is not the source of the infringement claim,

the liability claimed shall not have arisen out of TAD's negligent act or omission, and TAD promptly provide Respondent with written notice within 15 days following the formal assertion of any claim with respect to which TAD asserts that Respondent assumes responsibility under this section.

Attachment A

RESPONSE FORMAT

Respondent's Proposal shall include the following items in the following sequence, noted with the appropriate heading as indicated below. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture.

If submitting a hard copy proposal, submit **one (1) COMPLETE** original hard copy of your proposal, signed in ink, **Two (2) hard copies WITH ONLY TABS and documents for the General Information Form; Experience, Background, and Qualifications; Proposed Plan, etc. (NO PRICING SHOULD BE INCLUDED in the copies)** and one (1) copy of the **COMPLETE** proposal (including pricing) on compact disk (CD) or USB flash drive containing an Adobe PDF version of the complete proposal (including pricing). Each of the item requirements listed below must be labeled with the heading indicated below as a separate file on the CD or USB flash drive.

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EXECUTIVE SUMMARY. The summary shall include a statement of the work to be accomplished, how Respondent proposes to accomplish and perform each specific service and unique problems perceived by Respondent and their solutions.

GENERAL INFORMATION FORM. Use the Form found in this RFQ as Attachment C.

EXPERIENCE, BACKGROUND, & QUALIFICATIONS. Use the Form found in this RFQ as Attachment D.

PROPOSED PLAN. Use the Form found in this RFQ as Attachment E.

PRICE SCHEDULE. Use the Price Schedule that is found in this RFQ as Attachment F.

LITIGATION DISCLOSURE FORM. Complete and submit the Litigation Disclosure Form, found in this RFQ as Attachment G. If Respondent is proposing as a team or joint venture, then all persons or entities who will be parties to the contract (if awarded) shall complete and return this form.

PROOF OF INSURABILITY. Submit a letter from insurance provider stating provider's commitment to insure the Respondent for the types of coverages and at the levels specified in RFQ if awarded a contract in response to this RFQ. Respondent shall also submit a copy of their current insurance certificate.

SIGNATURE PAGE. Respondent must complete, sign, and submit the Signature Page found in this RFQ as Attachment H. The Signature Page must be signed by a person, or persons, authorized to bind the entity, or entities, submitting the Response. Responses signed by a person other than an officer of a corporate respondent or partner of partnership respondent shall be accompanied by evidence of authority.

Respondent is expected to examine this RFQ carefully, understand the terms and conditions for providing the services listed herein, and respond completely. FAILURE TO COMPLETE AND PROVIDE ANY OF THESE RESPONSE REQUIREMENTS MAY RESULT IN THE RESPONDENT'S RESPONSE BEING DEEMED NONRESPONSIVE AND THEREFORE DISQUALIFIED FROM CONSIDERATION.

Attachment B:

EVALUATION AND SELECTION PROCESS

Evaluation of responses will be conducted by an evaluation committee comprised of qualified TAD staff. The committee will evaluate, score, and rank all responsive responses based upon the information and references contained in the responses submitted. Once each member of the Selection Committee has rated each response and completed a rating sheet, a composite is developed which will indicate the Committee's collective ranking of the highest rated response in a descending order. Based on the response to this RFQ, the Selection Committee may select and/or recommend to the Board of Directors for Tarrant Appraisal District an individual/firm qualified to provide to TAD the services required under this RFQ.

The following criteria will be used for evaluating Responses for Tarrant Appraisal District and will be based on certain objective and subjective considerations as listed below:

Compliance with RFQ Instructions

The response will be evaluated for general compliance with the instructions issued in the Request for Responses.

- | | |
|--|-------------------------------------|
| ▪ Letter of Introduction and Executive Summary | Maximum points available: 5 points |
| ▪ Project Approach and Work Plan | Maximum points available: 30 points |
| ▪ Project Team Qualifications & Relevant Experience | Maximum points available: 30 points |
| ▪ Proposed Cost of Service | Maximum points available: 35 points |

Total Score (100 possible points)

Award of this contract will be based on the selection criteria stated above and pertinent information provided in requested Response Format relating to the company's experience, qualifications, personnel, availability, approach, and capability to provide and perform all of the services necessary to complete this project in an effective and timely manner. It is the general policy of the Tarrant Appraisal District, with regards to purchasing, to follow these basic guidelines:

- **Encourage and seek competition among qualified vendors**
- **Actively pursue and obtain goods and services at either the lowest practicable cost to TAD or that provide the best value to the district**
- **Assure that the public resources entrusted to TAD are used appropriately, prudently, and lawfully**
- **Provide responsible vendors (including historically under-utilized businesses) a fair and equitable opportunity to compete for and obtain TAD's business**
- **To encourage and allow qualified minority/women-owned businesses to be involved in the procurement of TAD's goods and services**
- **Prohibit the discrimination of prospective vendors on the basis of race, color, religion, national origin, handicap, or sex in the award of a contract or procurement of goods and services**
- **To consider competition, best value to TAD, and quality of work, to be the ultimate test in contractor, subcontractor, vendor, services, professional services and supplier utilization**

Attachment C:

GENERAL INFORMATION

1. Respondent Information: Provide the following information regarding the Respondent.

(NOTE: Co-Respondents are two or more entities proposing as a team or joint venture with each signing the contract, if awarded. Sub-contractors are not Co-Respondents and should not be identified here. If this response includes Co-Respondents, provide the required information in this Item #1 for each Co-Respondent by copying and inserting an additional block(s) before Item #2.)

Respondent Name: _____

(NOTE: Give exact legal name as it will appear on the contract, if awarded.)

Principal Address: _____

City: _____ State: _____ Zip Code: _____

Telephone No. _____ Fax No.: _____

Website address: _____

Year established: _____

Provide the number of years in business under present name: _____

Social Security Number or Federal Employer Identification Number: _____

Texas Comptroller's Taxpayer Number, if applicable: _____

(NOTE: This 11-digit number is sometimes referred to as the Comptroller's TIN or TID.)

DUNS NUMBER: _____

Business Structure: Check the box that indicates the business structure of the Respondent.

Individual or Sole Proprietorship If checked, list Assumed Name, if any:

Partnership

Corporation If checked, check one: For-Profit Nonprofit

Also, check one: Domestic Foreign

Other If checked, list business structure: _____

Printed Name of Contract Signatory: _____

Job Title: _____

Provide any other names under which Respondent has operated within the last 10 years and length of time under for each:

Provide address of office from which this project would be managed:

City: _____ State: _____ Zip Code: _____

Telephone No. _____ Fax No: _____

Annual Revenue: \$ _____

Total Number of Employees: _____

Total Number of Current Clients/Customers: _____

Briefly describe other lines of business that the company is directly or indirectly affiliated with:

List Related Companies:

2. Contact Information: List the one person who TAD may contact concerning your response or setting dates for meetings.

Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone No. _____ Fax No: _____

Email: _____

3. Does Respondent anticipate any mergers, transfer of organization ownership, management reorganization, or departure of key personnel within the next twelve (12) months?

Yes ___ No ___

4. Is Respondent authorized and/or licensed to do business in Texas?

Yes ___ No ___ If "Yes", list authorizations/licenses.

5. Where is the Respondent's corporate headquarters located?

6. Local/County Operation: Does the Respondent have an office located in Tarrant County, Texas?

Yes ___ No ___ If "Yes", respond to a and b below:

a. How long has the Respondent conducted business from its Tarrant County office?

Years _____ Months _____

b. State the number of full-time employees at the Tarrant County office.

7. Debarment/Suspension Information: Has the Respondent or any of its principals been debarred or suspended from contracting with any public entity?

Yes ___ No ___ If "Yes", identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

8. Surety Information: Has the Respondent ever had a bond or surety canceled or forfeited?

Yes ___ No ___ If "Yes", state the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.

9. Bankruptcy Information: Has the Respondent ever been declared bankrupt or filed for protection from creditors under state or federal proceedings?

Yes ___ No ___ If "Yes", state the date, court, jurisdiction, cause number, amount of liabilities and amount of assets.

10. Disciplinary Action: Has the Respondent ever received any disciplinary action, or any pending disciplinary action, from any regulatory bodies or professional organizations? If "Yes", state the name of the regulatory body or professional organization, date and reason for disciplinary or impending disciplinary action.

11. Previous Contracts:

a. Has the Respondent ever failed to complete any contract awarded?

Yes ___ No ___ If "Yes", state the name of the organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

b. Has any officer or partner proposed for this assignment ever been an officer or partner of some other organization that failed to complete a contract?
Yes ___ No ___ If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

c. Has any officer or partner proposed for this assignment ever failed to complete a contract handled in his or her own name?
Yes ___ No ___ If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

REFERENCES:

Provide Three (3) references, that Respondent has provided services to within the past three (3) years. The contact person named should be familiar with the day-to-day management of the contract and be willing to respond to questions regarding the type, level, and quality of service provided.

Reference No. 1:

Firm/Company Name _____
Contact Name: _____ Title: _____
Address: _____
City: _____ State: _____ Zip Code: _____
Telephone No. _____ Fax No: _____
Email: _____
Date and Type of Service(s) Provided: _____

Reference No. 2:

Firm/Company Name _____
Contact Name: _____ Title: _____
Address: _____
City: _____ State: _____ Zip Code: _____
Telephone No. _____ Fax No: _____
Email: _____
Date and Type of Service(s) Provided: _____

Reference No. 3:

Firm/Company Name _____

Contact Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone No. _____ Fax No: _____

Email: _____

Date and Type of Service(s) Provided: _____

Attachment D:
EXPERIENCE, BACKGROUND, QUALIFICATIONS

Prepare and submit narrative responses to address the following items.

1. List of primary contacts and resumes for those individuals assigned to the account.
2. Experience relevant to the Scope of Services requested by this RFQ to include but not limited to:
 - a. Practice of ad valorem appraisal
 - b. Analysis of metrics used in ad valorem appraisal and the International Association of Assessing Officers "IAAO" Standards
 - c. Knowledge of Texas property tax laws
 - d. Knowledge of Tarrant County and Texas housing markets (incl. other urban Texas markets noted in RFQ)
 - e. Knowledge of key aspects of the Tarrant County economy including employment, anchor industries, and tourism
3. List and describe relevant projects of similar scope performed over the past four years. Include date(s) and client names. Identify associated results or impacts of the work performed.
4. Years of experience the Respondent has provided services of similar type, scope and complexity.
5. Specify experience with public entity clients in Texas.

Attachment E:

PROPOSED PLAN

Prepare and submit the following items:

1. Describe, in detail, the proposed plan to meet the Scope of Services requested, including:
 - a. Perform the calculations noted in the “work to be performed” heading in Section 4 of this RFQ:
2. Describe the steps involved in deriving a comparison certain aspects of the property tax operations of the Tarrant Appraisal District (TAD) and;
 - a. Harris CAD
 - b. Travis CAD
 - c. Bexar CAD
 - d. Dallas CAD
 - e. El Paso CAD
3. Compile the resulting statistics and comparisons in charts, graphs, and text to illustrate changes in volume and rates of notices of protest and orders determining protest among the five appraisal districts over tax years 2015 through 2019.
4. Describe the specific format in which the first part of the review will be provided to TAD, to include:
 - a. Maps, charts and graphs
 - b. Narrative conclusions
5. Provide detailed implementation plan and timeline the Project

Attachment F:

PRICE SCHEDULE

Please provide your rate for providing the services described in this RFQ and Total. All services described in this RFQ and your response shall be included in the Consultant Services Fee, unless separate pricing has been provided for within this Price Schedule.

CONSULTING SERVICES FEE(S) \$ _____

Proposed Price should be inclusive of any and all labor and materials, service equipment, tools, transportation, set p charges, travel, methods of communication and miscellaneous services as necessary to complete the work as defined in the Section 1.2 - Scope of Service and in accordance with Section 1.3 – Term of Contract of this RFQ if awarded a contract pursuant to this solicitation. Respondent's response must be based on the proposed contract term, including renewal periods, stated in this RFQ. Proposing a different term of contract, or renewal terms may lead to disqualification of Respondent's response from consideration. As such, Respondent must provide pricing in the manner set forth in the RFQ's Price Schedule. Failure to do so may lead to disqualification of Respondent's response from consideration.

Attachment G:

LITIGATION DISCLOSURE FORM

Respond to each of the questions below by checking the appropriate box. Failure to fully and truthfully disclose the information required by this Litigation Disclosure form may result in the disqualification of your response from consideration or termination of the contract, once awarded.

Have you or any member of your Firm or Team to be assigned to this engagement ever been indicted or convicted of a felony or misdemeanor greater than a Class C in the last five (5) years?

Yes ___ No ___

Have you or any member of your Firm or Team to be assigned to this engagement been terminated (for cause or otherwise) from any work being performed for the TAD or any other Federal, State or Local Government, or Private Entity?

Yes ___ No ___

Have you or any member of your Firm or Team to be assigned to this engagement been involved in any claim or litigation with the Tarrant Appraisal District or any other Federal, State or Local Government, or Private Entity during the last ten (10) years?

Yes ___ No ___

If you have answered "Yes" to any of the above questions, please indicate the name(s) of the person(s), the nature, and the status and/or outcome of the information, indictment, conviction, termination, claim or litigation, as applicable. Any such information should be provided on a separate page, attached to this form and submitted with your response.

Attachment H:

SIGNATURE PAGE

By submitting a response, Respondent represents that:

If awarded a contract in response to this RFQ, Respondent will be able and willing to execute a contract with the understanding that the scope and compensation provisions will be negotiated and included in the final document.

If Respondent is a corporation, Respondent will be required to provide a certified copy of the resolution evidencing authority to enter into the contract, if other than an officer will be signing the contract.

If awarded a contract in response to this RFQ, Respondent will be able and willing to comply with all representations made by Respondent in Respondent's response and during Response process.

Respondent has fully and truthfully submitted a Litigation Disclosure form with the understanding that failure to disclose the required information may result in disqualification of response from consideration.

Respondent agrees to fully and truthfully submit the Respondent General Information form and understands that failure to fully disclose requested information may result in disqualification of response from consideration or termination of contract, once awarded.

Respondent is authorized to submit this response on behalf of the entity.

Complete the following and sign on the signature line below. Failure to sign and submit this Signature Page will result in rejection of your response.

Respondent Entity Name:

Signature: _____

Printed Name: _____

Title: _____

(NOTE: If response is submitted by Co-Respondents, an authorized signature from a representative of each Co-Respondent is required. Add additional signature blocks as required.) While Co-Respondent does not have to submit a copy of Respondent's response, Co-Respondent should answer any questions or provide any information directed specifically to Co-Respondent.

Co-Respondent Entity Name:

Signature: _____

Printed Name: _____

Title: _____

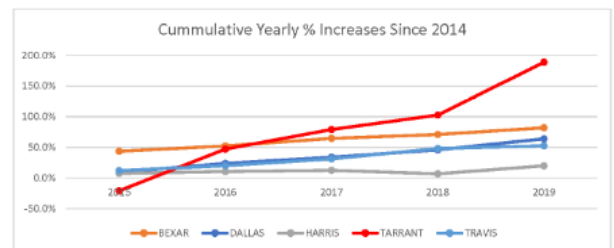
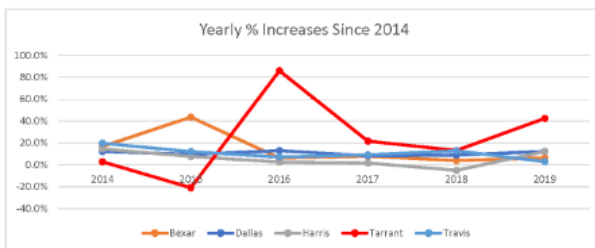
Attachment I:

Included for your further information is the document that initially sparked TAD’s interest in looking closer at and doing more detailed work with the data elements specified in Section 1

STATEWIDE APPRIASAL PROTESTS BY COUNTY												
YEAR	BEXAR		DALLAS		HARRIS		TARRANT		TRAVIS			
	Tot. Protests	% Inc.	Tot. Protests	% Inc.	Tot. Protests	% Inc.	Tot. Protests	% Inc.	Tot. Protests	% Inc.		
2013	55,064		84,402		306,962		70,000		80,447			
2014	64,297	16.8%	94,713	12.2%	351,877	14.6%	72,000	2.9%	96,371	19.8%		
2015	92,365	43.7%	103,770	9.6%	378,765	7.6%	57,000	-20.8%	107,977	12.0%		
2016	98,046	6.2%	117,271	13.0%	388,828	2.7%	106,000	-2.2%	115,733	8.2%		
2017	105,815	7.9%	126,967	8.3%	395,763	1.8%	129,000	24.5%	126,425	2.3%		
2018	109,991	3.9%	138,285	8.9%	376,144	-5.0%	146,000	13.2%	142,812	2.3%		
2019	117,030	6.4%	155,336	12.3%	422,147	12.2%	208,000	47.9%	147,039	6.9%		

Increase from 2015 to 2016: BEXAR 26.7%, DALLAS 49.7%, HARRIS 11.5%, TARRANT 264.9%, TRAVIS 36.2%

From 2014: BEXAR 188.9%, DALLAS 26.7%, HARRIS 11.5%, TARRANT 264.9%, TRAVIS 36.2%



November 6, 2020

Ref: Communications Survey Services Request for Qualifications

Dear Responder:

The Tarrant Appraisal District (TAD) will require the services of an individual/firm to provide the referenced services. Enclosed is a copy of the Request for Qualifications.

In order to establish a list of qualified, interested, and available people, this letter is being directed to you. If interested in providing the specific services please provide TAD with the following:

- A) ONE (1) MANUALLY SIGNED ORIGINAL. TWO (2) HARD COPIES AND ONE (1) EXACT COPY ON USB DRIVE (in .pdf format excluding your financials) of your qualifications, unless additional copies are otherwise requested in the Request for Qualifications, specifically stating your interest and any other specific information or statements called for in the enclosed Request for Qualifications.
- B) Complete information about your firm and staff qualifications.
- C) A list of projects which indicate specific background and experience in the program area being considered.
- D) A quotation of proposed rates, fees or charges, and other detailed cost proposal or cost breakdown information.

Any questions regarding this RFQ should be submitted via email ONLY to Jeff Craig at: JCraig@TAD.org no later than **2 PM Friday, November 20, 2020**. The answers to the questions received will be distributed in the form of an addendum shortly thereafter.

If any addenda are issued to this RFQ, a good faith attempt will be made to deliver a copy to each of those Proposers who, according to the records of TAD, has requested a copy of this RFQ and will be posted on TAD's website www.tad.org/about/procurement/. However, prior to submitting a response, it shall be the responsibility of the Proposer to contact the Tarrant Appraisal District as JCraig@TAD.org to determine if addenda were issued and, if so, to obtain such addenda for attachment to their response.

Your response must be received no later than **2 PM Tuesday, December 1, 2020**, and directed to:

Tarrant Appraisal District – COMMUNICATIONS SURVEY SERVICES RFQ

**Attn: Jeff Craig, Director of Administration
2500 Handley-Ederville Rd
Fort Worth, TX 76118**

If hand delivered (discouraged due to Covid-19) to our front door, your package/response must be date and time stamped by a TAD employee upon receipt. If it "appears" in our offices after the deadline and there is no date/time stamp, it will be rejected.

Yours Very Truly,

Jeff Craig



**COMMUNICATIONS SURVEY
SERVICES
REQUEST FOR
QUALIFICATIONS
November 6, 2020**

DUE BY OR BEFORE 2:00PM, DECEMBER 1, 2020

**REQUEST FOR QUALIFICATIONS
COMMUNICATIONS SURVEY SERVICES
November 6, 2020**

Part 1. Introduction

The Tarrant Appraisal District (TAD) seeks to enter into an agreement with a qualified firm or individual that has substantial and relevant experience and expertise to provide **communications survey services**. TAD would like to examine if and how appraisal districts' publicizing the availability of the process and how to protest may have affected the number of protests files with their appraisal review boards and evaluate the survey results for possible use in creating a communications strategic plan.

TAD is a political subdivision of the State of Texas, having been established under the Texas Property Tax Code by the Texas Legislature in 1979. The District is responsible for the appraisal of, and arriving at fair market values for, property subject to ad valorem taxation in Tarrant County. The district is governed by a six member Board of Directors that appoint a Chief Appraiser/Executive Director who serves as the district's chief administrator.

TAD seeks responses from qualified Respondents interested in providing the services as described in this RFQ. The Successful Proposer(s) must meet all requirements of the RFQ maintain proper licensing, and comply with all federal, state. And local laws and mandates relative to the services specified in this RFQ.

Identifying and understanding the role media coverage and direct mail solicitations impact the property tax appraisal and equalization phases and the possible effects they may have on appeals filed with the Tarrant Appraisal Review Board is an impetus for requesting a review such as this one. This service might also set the stage for TAD to create a communications strategic plan. This plan will ultimately identify key communication themes in support of TAD's identity and brand, provide guidance to ensure consistent messages across TAD's communication platforms, and create a basis to measure outcomes and success.

Part 2. Scope of Services, Required Work Products and Submission Deadlines

A. GENERAL

The goal of the Communications Survey is to Identify and understand the role media coverage and direct mail solicitations regarding the protest phase of the property tax appraisal and equalization phases and what effect that may have had on protests filed with the Tarrant Appraisal Review Board. This service might also set the stage for TAD to create a communications strategic plan. These plans will ultimately identify key communication themes

in support of TAD's identity and brand, provide guidance to ensure consistent messages across TAD's communication platforms, and create a basis to measure outcomes and success.

B. CONTRACTOR RESPONSIBILITIES

The Scope of Work specifies the products and services that TAD expects to acquire from the Successful Proposer(s) as a result of the solicitation.

The Contractor shall be responsible for:

1. Analyze how awareness of the property tax appraisal and equalization affects the filing of protests to the Tarrant Appraisal Review Board.

a. Perform a thorough search of articles and marketing materials within each of the years **2016, 2017, 2018, 2019** to obtain articles or news reports on the appraisal districts (CADs) in each of the 5 major urban counties to identify and understand the role media coverage and direct mail solicitations regarding the property tax appraisal and equalization phases and what effect that may have had on protests filed with the Tarrant Appraisal Review Board. The urban CAD's and media markets include **Tarrant, Dallas, Harris, Bexar and Travis**.

Media coverage investigated should be focused on that which directly relates to the availability of the protest and informal resolution processes.

2. Inventory and assess TAD communication channels.

- a. Create an inventory of TAD communication platforms and channels such as the website, social media pages, newsletters, signage, reports, etc.
- b. Assess the value of each channel in communicating and encouraging engagement with target constituent groups. This assessment would include research into channels used by benchmark CAD's and similar organizations and their effectiveness.
- c. Make recommendations regarding the addition, enhancement, combination, or elimination of channels.

3. Measure outcomes of efforts.

- a. Measure effectiveness of communication and marketing efforts as they relate to community awareness, engagement, or behavioral change
- b. Suggest metrics to determine if outcomes are being met.

4. Assess communications and marketing resources.

- a. Assess resources for communications and marketing including: advertising budgets, staffing, contracted services, equipment, facilities, training, software, organizational structure, etc.
- b. Make recommendations to better organize and enhance current resources needed to implement messaging objectives.

5. Map out communications and engagement opportunities.

- a. Review systems and processes that TAD uses in communicating with the media, social media, and the public
- b. Suggest systems and processes that will enable TAD to strengthen communications at all levels of the organization and to be more proactive in communicating with the media and the public
- c. Identify opportunities to collaborate across TAD departments on communication and marketing opportunities

6. Identify and evaluate relationships with constituent groups.

- a. Identify constituent groups
- b. Define strength of relationship with each group. Determine if the connection could/should be strengthened.

Part 3. Response Submission Requirements

The Purchasing Department will not accept oral responses or responses received by telephone or FAX machine. Responses must be prepared simply and economically, providing a straightforward, concise description of Proposer's ability to meet all requirements and specifications of this RFQ. Emphasis should be focused on completeness, clarity of content, and responsiveness to all requirements and specifications of this RFQ.

The response must be submitted in hard copy. **Responder shall submit one (1) evident original and five (2) copies, marked "copy" of the entire response, plus one (1) digital copy (on CD, DVD or thumb drive).**

TAD requires complete responses to every section within this RFQ. The intent of the response format is to expedite review and evaluation. To facilitate the review of the responses, Proposers

shall follow the described format. It is not the intent to constrain Proposers with regard to content, but to assure that the specific requirements set forth in this RFQ are addressed in a uniform manner amenable to review.

TAB “A” - FIRM BACKGROUND

TAD is seeking a firm(s) with qualified experience and the capacity to provide the services required.

1. Briefly introduce the firm and provide number of years in business.
2. Provide a summary of the administration, organization and staffing of the firm, including multiple offices, if applicable.
3. Include the same for any associate firm or sub-consultant.
4. Provide the location of the firm or branch that will provide services to TAD.

TAB “B” - PROJECT EXPERIENCE and QUALIFICATIONS

1. Provide details on experience and qualifications of the firm in performing services of similar scope and size related to RFQ scope.
2. Describe at least three (3) projects that are complementary in nature to this project. References for each project should be included (preferably other CAD’s, municipal, or local governments that the proposer has provided services to).
3. Identify the proposed team members who will provide services. Provide details on their experience and qualifications. Include resumes for each person to be assigned. Include any professional designations and affiliations, certifications and licenses, etc.

TAB “C” - PROPOSED PLAN and TECHNICAL APPROACH

1. Provide a narrative description of the Firms’ plan to accomplish the work and services to be provided to TAD. Provide timelines and graphs for completing the work. Demonstrate capacity to complete the work. Clearly acknowledge your understanding of the Scope of Work.
2. Provide suggestions and ideas for managing this project in an efficient, effective and innovative manner.
3. Identify progress reports that will be made available during the process and key decision points.

TAB “D” - COST PROPOSAL

1. Provide a fixed fee not to exceed total cost proposal to include travel expenses.
2. The actual contract amount will be negotiated after the Firm has been selected and the scope of work finalized.

Part 4. Terms and Conditions

A. The attached “Communications Survey Services Terms and Conditions” is, by reference, incorporated into this Request for Qualifications and will automatically be a part of any subsequent contract awards and contracts.

B. Requests for information pursuant to the Texas Open Records Act should be promptly directed to TAD’s Public Information Officer for handling. The selected firm should not respond to any such requests.

C. In compliance with Chapter 552 of the Texas Open Records Act, Section 22.27 of the Texas Property Tax Code, and other relevant statutes, judicial decisions, and Texas Attorneys General opinions, the selected firm shall maintain the confidentiality of reports, statements, renditions, and other information for which confidentiality has been promised or which is otherwise lawfully excepted from public disclosure.

D. The selected firm shall maintain, retain and preserve any and all records and information hereunder in compliance with Subtitle C., Title 6, of the Local Government Code and rules adopted under that title. Upon completion or termination of the Communications Survey Services Agreement contemplated herewith, the selected firm shall timely provide all such records, data, and information, in good and usable condition and form, to TAD at no additional cost to the District.

E. Throughout the term of the Communications Survey Services Agreement contemplated herewith, TAD shall have, with proper advance notice and during normal business hours, open, complete, and free access to, and the right to examine, audit, and copy, any and all records, data, and other information associated with the services and work products provided by the selected firm, exclusive of any unrelated and/or proprietary information, computer software, and similar tangible and intangible property owned and/or licensed by the selected firm.

Part 5. Exceptions

Any exceptions to, or variances from, the Scope of Services, Required Work Products and Submission Deadlines and other provisions of this RFQ, including the Communications Survey Services Terms and Conditions must be noted as exceptions and fully explained in writing in RFQ submissions.

Part 6. Submissions and Submission Deadlines

Firms must submit ONE (1) original copy, TWO (2) copies and ONE (1) pdf copy on USB drive of their RFQ Submission *in a sealed envelope marked "Communications Survey Services Cost Submission"*.

All submissions *must be received at TAD by or before 2:00 P.M. December 1, 2020*. Submissions should be addressed as follows:

**Tarrant Appraisal District
Communications Survey Services RFQ"
2500 Handley-Ederville Road
Fort Worth, Texas 76118-6909
Attn: Jeff Craig**

Part 7. Questions

Questions pertaining to this Request for Qualifications should be directed to Jeff Craig at (817) 595-6002 during normal business hours.

TERMS AND CONDITIONS

These terms and conditions are, by reference, incorporated into and made a part of the Tarrant Appraisal District (TAD) November 6, 2020 "Communications Survey Services" Request for Qualifications" (RFQ) and any and all subsequent contract awards and purchase orders.

Late Submissions

RFQs received by TAD after the submission deadline will be considered void and unacceptable. TAD is not responsible for lateness or non-delivery of mail, carrier, etc.

Altering Submissions

RFQs cannot be altered or amended after the submission deadline. Any interlineations, alteration, or erasure made before opening must be initialed by the signer of the RFQ, guaranteeing authenticity.

Withdrawal of RFQ

A RFQ may not be withdrawn or cancelled by the firm without TAD's permission for a period of ninety (90) days following the date designated for the receipt of RFQs, and the firm so agrees upon submittal of its RFQ.

Funding

Funds for payment have been provided through the TAD budget approved by its Board of Directors for this fiscal year only. Texas state statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise after the end of the current fiscal year shall be subject to budget approval.

Sales Tax

TAD is exempt from payment of Texas sales tax and federal excise tax.

Contract

This RFQ, when properly accepted or approved by TAD, will constitute a contract equally binding between the successful firm and TAD. No different or additional terms will become a part of this contract except upon written changes agreed upon by the parties.

Independent Contractor Status

The selected firm acknowledges that it is an independent contractor, and, as such, understands that TAD is not liable to the selected firm for any benefits or coverages as provided by the workers' compensation and/or unemployment compensation laws of the State of Texas and that anyone employed by the selected firm shall not be considered an employee of TAD for purposes of workers' compensation and/or unemployment compensation coverage. Furthermore, the selected firm declares, as an independent contractor, that it has been and will

be free from any control or direction by TAD over its performance of the services and provision of the work products covered by this contract.

Changes

No oral statement of any person shall modify or otherwise change or affect the terms, conditions, or requirements stated in the resulting contract. All changes to this contract shall be made in writing as agreed upon by the parties.

Certificate of Interested Parties (Form 1295)

The following information regarding Form 1295 Information applies ONLY to an awarded vendor.

The law states that a governmental entity may not enter into certain contracts with a non-exempt business entity unless the business entity submits a disclosure of interested parties to the governmental entity. By submitting a proposal in response to this solicitation, the Vendor agrees to comply with HB 1295, Government Code 2252.908. Vendor agrees to provide TAD's Purchasing Agent, and/or requesting department, the "Certificate of Interested Parties," Form 1295 as required, within ten (10) business days from notification of pending award, renewal, amended or extended contract.

The Filing Process:

1. Prior to award by TAD, Vendor will be required to log in to the Texas Ethics Commission, https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm and fill out the Electronic Filing Application.
2. Once submitted, the system will generate an electronic Form 1295 displaying a "Certificate Number." Vendor must print and complete Form 1295.
3. Within ten (10) business days from notification of pending award by the TAD Purchasing Agent, the completed Form 1295 must be submitted to TAD.
4. Vendor will need to repeat the process and obtain a separate Form 1295 each time they enter into a new contract, renew a contract or make modification, and/or amendments to a TAD contract.

Instruction and information are available at <https://www.ethics.state.tx.us/filinginfo/1295/> or you may call the Texas Ethics Commission at (512) 463-5800.

Conflict of Interest Disclosure Requirement

Pursuant to Chapter 176 of the Local Government Code, any person or agent of a person who contracts or seeks to contract for the sale or purchase of property, goods, or services with a local governmental entity (i.e. TAD) must disclose in the Questionnaire Form CIQ ("Questionnaire") the person's affiliation or business relationship that might cause a conflict of interest with the local governmental entity. By law, the Questionnaire must be filed with TAD no later than seven days after the date the person begins contract discussions or negotiations with TAD, or submits an application or response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with TAD. Updated Questionnaires must be filed in conformance with Chapter 176.

A copy of the Questionnaire Form CIQ is available at <http://www.ethics.state.tx.us/forms/conflict>.

If you have any questions about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirement. An offense under Chapter 176 is a Class C misdemeanor.

NOTE: If you are not aware of a Conflict of Interest in any business relationship that you might have with TAD, state Vendor name in the # 1, use N/A in each of the areas on the form. However, a signature is required in the #7 box in all cases.

TAD Board members are Wendy Burgess, Rich DeOtte, Gary Losada, Joseph Martinez, Tony Pompa and Kathryn Wilemon. TAD's Chief Appraiser is Jeff Law.

PROHIBITION ON CONTRACTING WITH COMPANIES THAT BOYCOTT ISRAEL

The firm acknowledges that in accordance with Chapter 2270 of the Texas Government Code, TAD is prohibited from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The terms "boycott Israel" and "company" shall have the meanings ascribed to those terms in Section 808.001 of the Texas Government Code. By signing this contract, the firm certifies that the firm's authorized representative's signature provides written verification to TAD that the firm: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

Revised August 31, 2017.

COMPANIES ENGAGED IN BUSINESS WITH IRAN, SUDAN, OR FOREIGN TERRORIST

ORGANIZATION. Pursuant to Texas Government Code Chapter 2252, Subchapter F, Seller affirms that is it not identified on a list created by the Texas Comptroller of Public Accounts as a company known to have contracts with or provide supplies or services to a foreign terrorist organization.

Ethics

The respondent shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of TAD.

Lawful Compliance

The selected firm must comply with all relevant federal, state, county and local laws in the performance of the services and provision of the products provided herewith.

TAD Indemnification

The selected firm shall defend, indemnify, and hold harmless TAD and all of its officers, agents, and employees from all suits, actions, or other claims of any character, name, or description brought for or on account of any injuries or damages received or sustained by any person,

persons, or property on account of any negligent act or fault of the selected firm, and/or any of the selected firm's agents, employees, subcontractors, or suppliers in the execution of, or performance under, any contract award and/or purchase order. The selected firm indemnifies and will indemnify and save harmless TAD from liability, claim, or demand on its part and its agents, servants, customers, and/or employees whether such liability, claim, or demand arise from event or casualty happening on or within TAD premises themselves or happening upon or in any halls, entrances, stairways, driveways, parking areas, or approaches of or to TAD property. The selected firm shall pay any judgment with costs which may be obtained against TAD growing out of any such injury or damages.

Wages

The selected firm shall pay or cause to be paid, without cost or expense to TAD, all such wages and benefits to its employees as required by state and federal law.

Payment

Payment to the selected firm shall be made subsequent to TAD receipt and acceptance of the specified work products and within 30 days following TAD receipt of an accurate invoice for same. Periodic progress payments may be made, subject to verifiable evidence or documentation that indicated work and progress have actually occurred and that such payment is warranted. Any such progress payments may be subject to withholding 10% retainage, with accumulated retainage amounts being paid upon TAD receipt and acceptance of all specified work products for a particular tax year. Payment for authorized as-needed lawsuit-related services shall be made within 30 days of TAD receipt of accurate invoices for same.

Termination of Contract

TAD reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of TAD in the event of breach or default of this contract. In the event the selected shall fail to perform, keep, or observe any of the requirements, terms or conditions of this contract, TAD may give the selected firm written notice of such default and, if same is not remedied to the satisfaction and approval of TAD within two (2) working days of receipt of such notice, default may be declared and all the selected firm's rights shall terminate.

Assignment

The selected firm shall not assign, transfer, sell, or convey this contract, in whole or in part, without the prior written consent of TAD.

Venue

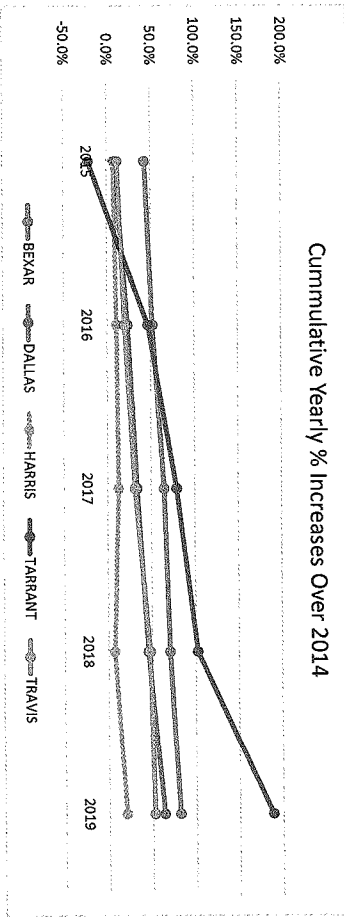
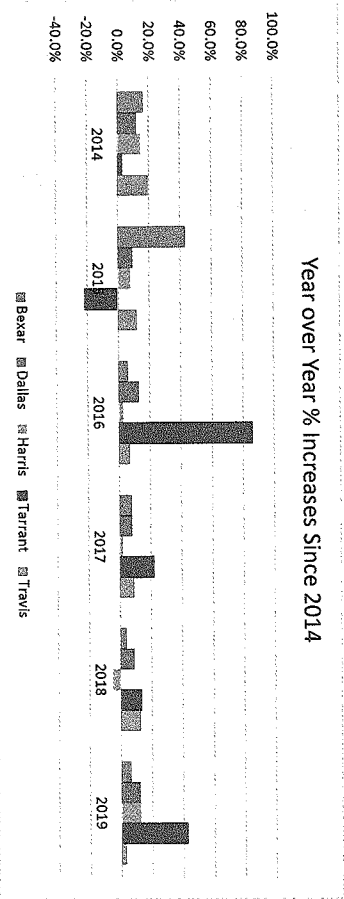
This contract will be governed and construed according to the laws of the State of Texas and is performable in Tarrant County, Texas.

Silence of Specifications

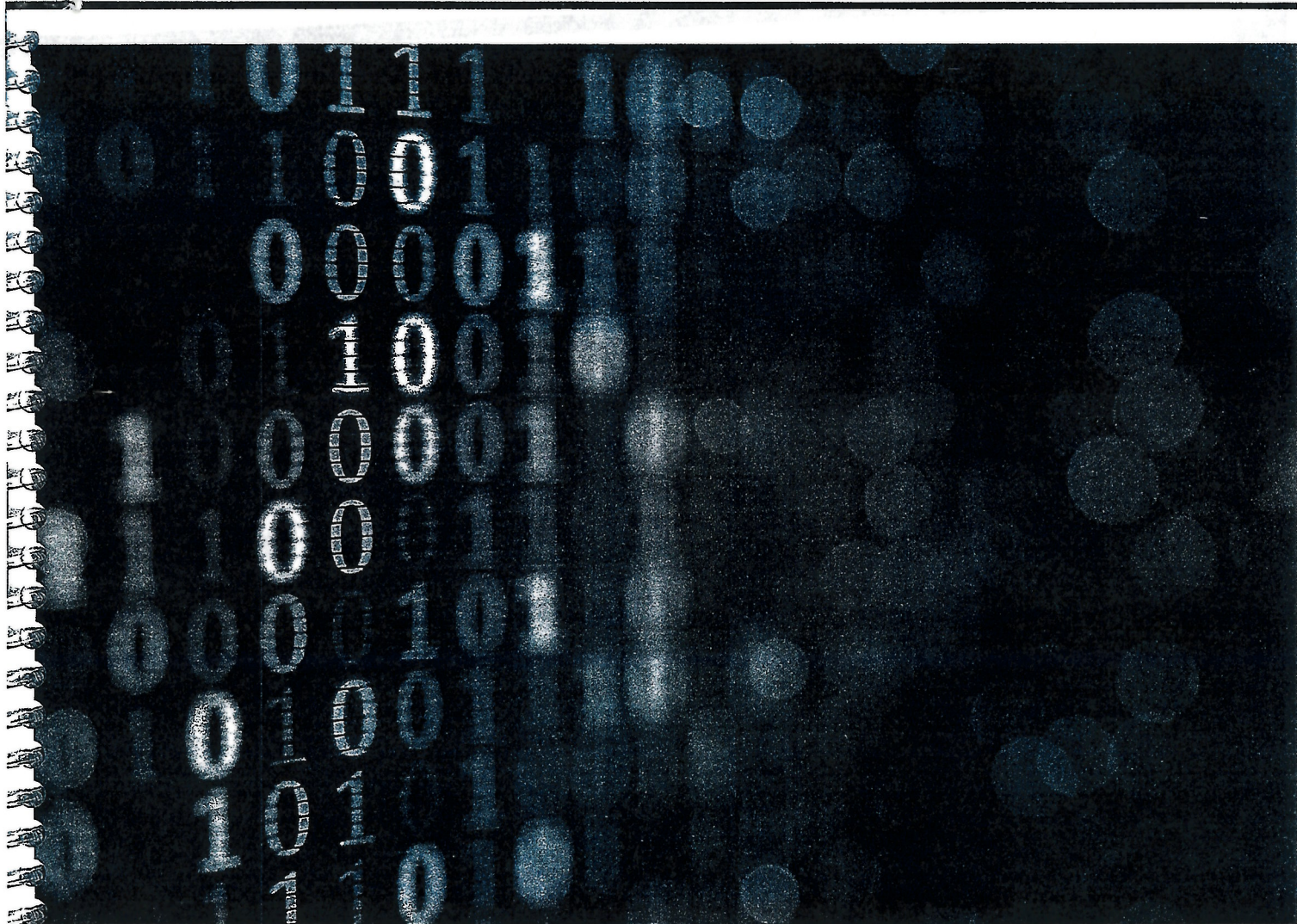
The apparent silence of the RFQ (including these terms and conditions and the cost submission form) as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the RFQ shall be made on the basis of this statement.

STATEWIDE APPRAISAL PROTESTS BY LARGE URBAN COUNTY

YEAR	COUNTY			COUNTY			COUNTY			COUNTY		
	BEJAR	DALLAS	HARRIS	TARRANT	TRAVIS	TARRANT	HARRIS	DALLAS	BEJAR	TARRANT	TRAVIS	
	Tot. Protests	% over 2014	% Y-Y Inc.	Tot. Protests	% over 2014	% Y-Y Inc.	Tot. Protests	% over 2014	% Y-Y Inc.	Tot. Protests	% over 2014	% Y-Y Inc.
2013	55,064			306,962			70,000			80,447		
2014	64,297	16.8%	16.8%	351,877	14.6%	14.6%	72,000	2.9%	2.9%	96,371	12.0%	12.0%
2015	92,365	43.7%	43.7%	378,765	7.6%	7.6%	57,000	-20.8%	-20.8%	107,977	20.1%	12.0%
2016	98,046	52.5%	6.2%	388,828	10.5%	2.7%	106,000	47.2%	86.0%	115,733	31.2%	7.2%
2017	105,815	64.6%	7.9%	395,763	6.9%	1.8%	129,000	79.2%	21.7%	126,425	48.2%	9.2%
2018	109,991	71.1%	3.9%	376,144	6.9%	-5.0%	146,000	102.8%	13.2%	142,812	48.2%	13.0%
2019	117,030	82.0%	6.4%	422,147	20.0%	12.2%	208,000	188.9%	42.5%	147,039	52.6%	3.0%
Increase over 2015			26.7%			11.5%			264.9%			36.2%
Increase over 2014			82.0%			20.0%			188.9%			52.6%



Compiled by Rich DeOtte
2/13/2020
for TAD Board of Directors



Aumentum Independent Verification and Validation Procedures: Results

Tarrant Appraisal District
December 16, 2016

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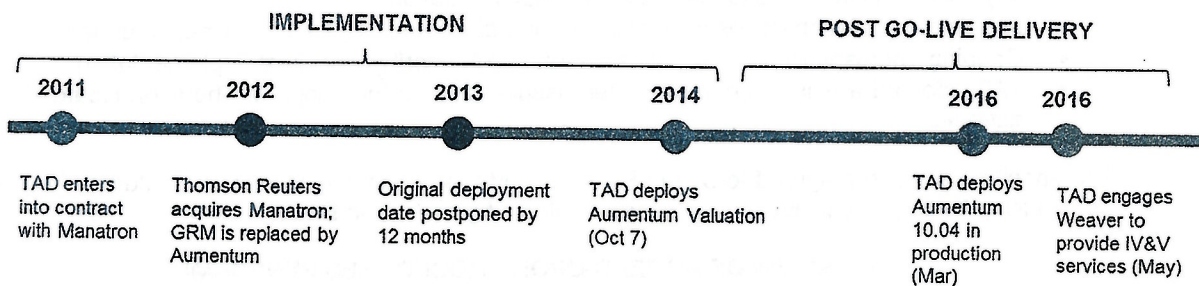
TARRANT APPRAISAL DISTRICT AUMENTUM INDEPENDENT VERIFICATION & VALIDATION PROCEDURES DECEMBER 16, 2016

BACKGROUND

Tarrant Appraisal District (TAD) is responsible for local property tax appraisal and exemption administration for seventy-three jurisdictions or taxing units in the county. Separate appraisal departments are responsible for the valuation of all real and business personal property. The Commercial Department has three work divisions: Commercial Real Property Appraisal including complex commercial appraisal/abatements, Commercial Research and Reporting and Litigation/Arbitration. Business Personal Property Appraisal includes BPP, research, utilities and minerals. The Residential Department includes Residential Appraisal, Residential Research and an Agricultural Land Valuation section.

TAD's previous mainframe computer assisted mass appraisal (CAMA) system was a combination of commercial-off-the-shelf (COTS) products eventually and thoroughly customized by TAD programming staff over the course of 30+ years. The system has come to be referred to as the "legacy system." Due to the high costs of maintaining the legacy system, TAD management began an exploratory process to identify potential replacement systems. The timeline below was created to depict major events associated with the effort to replace the legacy system.

Timeline



2011	TAD enters into a contract with Manatron to replace the legacy system. The new system is expected to consist of several modules of Manatron's Government Revenue Management (GRM) products suite.
2012	Thomson Reuters acquires Manatron; GRM is replaced by Aumentum.
2013	Thomson Reuters requests that the originally scheduled October 2013 date be postponed to October 2014. Thomson Reuters reimburses TAD for the cost of operating and maintaining the Legacy System for the period between October 2013 and October 2014.
Oct 2014	After a three year implementation effort, TAD deployed Thomson Reuters' Aumentum Valuation (Aumentum) product (renamed from GRM) on October 7, 2014. Thomson Reuters continued to deliver features and functions for more than two years past the October 2014 live date.
Mar 2016	Upgrade to release 10.04
Ongoing	Thomson Reuters continues to deliver features and functions from Go-Live to this day.

TAD and users of TAD data, such as taxing entities, encountered a number of issues in the months after go-live. These issues included process inefficiencies resulting from missing functionality and previously unidentified software bugs, and challenges at taxing entities being able to upload appraisal data into their systems. Many of these issues have persisted well into 2016.

In May 2016, TAD engaged Weaver and Tidwell, L.L.P. (Weaver) to provide Independent Verification and Validation (IV&V) agreed-upon procedures relating to the Aumentum system implemented by TAD. At the

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request and direction of the Board and Management of TAD, Weaver prepared test procedures in accordance with ISACA's COBIT 5 Framework, the widely accepted framework for evaluating IT governance and controls. The Board and Management of TAD subsequently approved the agreed-upon procedures.

The purpose of these procedures is to assess the methods by which the following activities were performed, and the alignment of these activities to the criteria specified in COBIT 5:

- Business requirements were defined prior to system selection, and augmented and tracked through resolution during the project;
- Business requirements were included in the Request For Proposal (RFP), and formal business requirements were used to evaluate proposals;
- Project management documentation was created and maintained throughout the course of the project;
- System design was compared to business requirements and approved prior to development;
- Test plans were prepared against business requirements, and test results approved prior to deployment;
- A formal process to authorize deployment was followed, including assessing the completeness of user testing, receiving agreement from business process owners, and informing stakeholders of any risks and limitations to the system at implementation;
- Post implementation issues were tracked, prioritized and resolved in a timely manner;
- Ongoing Thomson Reuters activities address high priority items post implementation;
- TAD adopted a plan to address system issues beyond the scope of Thomson Reuters' planned activities.

The specific procedures agreed to by the Board and Management which were executed by Weaver and the resulting findings are included in the section titled, "Agreed-Upon Procedures and Findings".

OVERVIEW OF AGREED-UPON PROCEDURES PERFORMED

As part of our procedures, we conducted interviews with key internal stakeholders at TAD, stakeholders at the taxing entities, third party vendors for the taxing entities, representatives from the software vendor Thomson Reuters, system integration consultants hired by TAD, and other affected parties to gain an understanding of processes and procedures during the Aumentum software implementation. The table below includes a listing of key personnel interviewed:

Tarrant Appraisal District	
Brad Patrick	Senior Business Personal Property Manager
David Law	Commercial Appraisal Manager
Debbie Cabello	Commercial Research & Reporting Manager (UAT Manager)
DJ Whitehead	Information Services Director (Project Manager)
Donna Perlick	Director of Support Services
Jeff Craig	Director of Administration
Jeff Law	Chief Appraiser & Executive Director
Joe Potthoff	Chairman of the Board of Directors
Kurt Myers	TAD Consultant
Loretta Baslee	Data Services Manager
Precious Bowers	Support Services Manager
Randy Armstrong	Director of Residential Property Appraisal

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Robin Willim	Quality Assurance Specialist
Troy Hanson	Residential Valuation Manager (Project Manager)

Thomson Reuters

Dan Cullerton	Senior Program Manager (Project Manager)
Jane Pope	Government Contracts & Compliance Director
Mat Greener	Sr. Director - Customer Support (Project Manager)
Mindy Alexander	Software Engineering Director

Tarrant County

GK Maenius	County Administrator
Renee Tidwell	County Auditor
Ron Wright	Tax Assessor-Collector
Tom Spencer	Tax Assessor-Collector Chief Deputy

Third Party Vendors

Steve Johnson	Principal, Spindlemedia Inc.
Du Nguyen	President, Governmental Data Services Inc.

City of Arlington

Erin Clark	Public Finance Administrator
Ethan Klos	Treasurer
Trina Taylor	Senior Budget Analyst

City of Watauga

Greg Vick	City Manager
Sandra Gibson	Director of Finance and Administration

City of North Richland Hills

Mark Mills	Budget & Research Director
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Grapevine Colleyville ISD

Colette Ballinger	Tax Assessor-Collector
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Keller ISD

Mark Youngs	Chief Financial Officer
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City of Fort Worth

Aaron Bovos	Chief Financial Officer
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Through the course of the project over 100 interviews and meetings were conducted. We also inspected over 950 documents including system selection documentation, project management artifacts including the system design matrix, independent consultant reports, system reports, e-mail communications, and related analysis.

The results of the agreed-upon procedures were evaluated against criteria from ISACA's COBIT 5 framework.



INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

To the Board of Directors and Management
Tarrant Appraisal District
2500 Handley Ederville Rd,
Fort Worth, TX 76118

We have performed the procedures enumerated in the section of this report titled "Agreed-Upon Procedures and Findings", which were agreed to by the Board of Directors (the Board) and Management of Tarrant Appraisal District (TAD), solely to assist the Board and Management in evaluating the processes and procedures over the implementation of the Thomson Reuters' (TR) Aumentum Valuation (Aumentum) system implemented by TAD in October 2014. This agree-upon procedures engagement was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants. The sufficiency of these procedures is solely the responsibility of the Board and Management of TAD. Consequently, we make no representation regarding the sufficiency of the procedures described in the section titled "Agreed-Upon Procedures and Findings", either for the purpose for which this reports has been requested or for any other purpose.

The procedures were performed at the administrative office in Fort Worth, Texas and various taxing entity offices. The agreed-upon procedures were based on the COBIT 5 framework by ISACA, the widely accepted framework for evaluating IT governance and controls. The complete list of agreed-upon procedures is included in the section titled, "Agreed-Upon Procedures and Findings." Procedures were organized according to the following topics:

- Business Requirements
- Software Selection Process
- Project Management Process
- System Design Approval Process
- Testing and Testing Approval Process
- Go/No-Go Decision Making Process
- Post-Implementation Issues
- Ongoing Thomson Reuters Activities
- TAD Information Systems Activities

Certain procedures that we performed were limited by our lack of direct access to TR personnel involved with the development, project management, implementation, and on-going maintenance of the Aumentum system at TAD. Where relevant, such limitations have been described in our results.

We were not engaged to, and did not conduct an audit, the objective of which would be the expression of an opinion on the data within the Aumentum system and it's efficacy. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

This report is intended solely for the information and use of the Board and Management of the Tarrant Appraisal District and is not intended to be and should not be used by anyone other than these specified parties.

Weaver and Tidwell, L.L.P.

Weaver and Tidwell, L.L.P.
Fort Worth, Texas
December 16, 2016

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AGREED-UPON PROCEDURE AND FINDINGS

The following table includes the procedures agreed upon by the Board and Management of TAD and our Findings based on those procedures.

Proc. No.	Procedure	Finding
1	<p>Business Requirements:</p> <ul style="list-style-type: none"> • Inspect initial requirements documentation and interview TAD management, Thomson Reuters and taxing entity personnel to: <ul style="list-style-type: none"> a) Identify whether business functional and technical requirements were defined by the project team prior to system selection. b) Determine whether initial requirements were augmented and tracked through to resolution during the course of the project. 	<ul style="list-style-type: none"> a) Detailed business and functionality requirements were not documented prior to system selection. Requirements did not fully account for the internal business processes that needed to be supported and deliverables that needed to be provided to taxing entities. b) Requirements were augmented and tracked through to resolution in the System Design Matrix (SDM) prepared by TAD and jointly updated and maintained with TR throughout the implementation process. Requirements were marked as "Successful Delivery" when completed and accepted by TAD pre and post go-live.
2	<p>Software Selection Process:</p> <ul style="list-style-type: none"> • Inspect software RFP documentation and interview members of TAD management to evaluate whether: <ul style="list-style-type: none"> a) Business functional and technical requirements were included in the RFP process. b) Formal criteria were used to evaluate proposed appraisal software solutions, and whether business functional and technical requirements were part of the criteria. 	<ul style="list-style-type: none"> a) High-level business functional and technical criteria were communicated to vendors through a Request For Proposal (RFP) but did not fully describe the statutory requirements and deliverables that needed to be provided to taxing entities b) Business functional and technical criteria communicated to vendors were used to assess vendor proposals. A weighted score sheet was used to assess vendor RFP responses and technical demonstrations. Also, a five-year cost benefit analysis correctly determined the replacement of the legacy system to be the most cost-effective solution based on internal projections. However, internal projections overstated the benefits of reduced IT headcount to operate and maintain the Aumentum system since these reductions were never realized.

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Proc. No.	Procedure	Finding
3	<p>Project Management Process:</p> <ul style="list-style-type: none"> • Inspect project management documentation, interview TAD management, and Thomson Reuters project personnel to determine whether: <ul style="list-style-type: none"> a) A project charter existed that defines the key stakeholders and the intent, scope and boundaries of what the project is intended to achieve. b) A project plan was created and maintained throughout the course of the project that included key milestones according to the system development lifecycle. c) Issues affecting the achievement of project milestones were tracked through to resolution. 	<p>a) TAD did not conduct a stakeholder analysis and did not formally identify key internal and external stakeholders impacted by this implementation. As a result, external entities were not included within a project oversight committee.</p> <p>A Project Management Team consisting of TAD Project Managers and internal stakeholders was formed; however, the team did not include any external stakeholders and affected parties. A formal project charter defining the stakeholders, scope, intent, and boundaries was not developed.</p> <p>b) Results for this procedure may have been adversely impacted by our lack of direct access to TR personnel actively involved with the development, project management, implementation, and on-going maintenance of the Aumentum system at TAD.</p> <p>Key milestones were identified and tracked throughout the project. However, TR did not follow a consistent, systematic program management or software development lifecycle process during development, leading to inadequate dissemination of information among TAD stakeholders, TR employees, as well as lost code, and failure to adequately track support cases submitted by TAD.</p> <p>The initial TAD Project Manager for the Aumentum implementation had relevant project management experience and credentials. However, she retired early in the project. The two successive TAD Project Managers lacked relevant project management credentials and IT implementation experience for a project of the scale and complexity of Aumentum. Key project management steps were not formally documented.</p> <p>c) Issues and overall progress against requirements were tracked through resolution within the SDM. Although TR developed and delivered Executive Status reports to track overall project status, these reports lacked overall tracking against milestones. Management lacked consistent visibility into overall project status and metrics.</p>

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Proc. No.	Procedure	Finding
4	<p>System Design Approval Process:</p> <ul style="list-style-type: none"> • Inspect project management and system design documentation, interview members of TAD management, Thomson Reuters, and any taxing entities that participated in system design, to determine whether: <ul style="list-style-type: none"> a) The business functional and technical requirements were evaluated against the system design. b) System design was approved prior to development. 	<ul style="list-style-type: none"> a) An approved preliminary System Design Matrix (SDM) was incorporated into the contract through inclusion in the Statement Of Work (SOW). A more detailed SDM detailing functional requirements was collaboratively maintained and updated with TR throughout the Aumentum implementation. Input from taxing entities was not included during the requirements definition phase. b) A high level System Design Matrix (SDM) was approved and included in the RFP. However, the SDM lacked detail that later had to be added to the SDM in subsequent revisions and did not include detail around taxing entity reports and statutory requirements. Moreover changes to reports and data exports for taxing entities were not communicated timely.

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Proc. No.	Procedure	Finding
5	<p>Testing and Testing Approval Process:</p> <ul style="list-style-type: none"> • Inspect project management and system testing documentation, interview members of TAD management, Thomson Reuters, and any taxing entities that participated in system testing to determine whether: <ol style="list-style-type: none"> a) The project plan included user acceptance testing, key reports testing, system integration testing, and data conversion testing; b) Testing results were tracked against business functional and technical requirements c) Testing results were approved prior to go-live. 	<p>a) Testing responsibilities between TAD and TR were not clearly delineated, and there was incomplete testing of Aumentum in the overall business process.</p> <p>TR could not conduct system integration testing as required by the Test Strategy Plan since 130 requirements and several modules were not fulfilled as of Go-Live. TR tested core Aumentum functions only relying on TAD user acceptance testing to test all customizations required to make Aumentum operational within the TAD environment. Testing did not utilize representative production data consisting of a mix of converted and native data from TAD's environment. Moreover, processed data outputs such as reports were not tested for validity and accuracy as part of the testing procedures.</p> <p>b) Results of functional testing performed were tracked in a Test Scripts & Test Faults Tracker spreadsheet where individual test results were tracked by module and functional requirement.</p> <p>c) User acceptance testing procedures were not completed as scheduled and multiple business processes could not be tested thoroughly from beginning to end. Over 100 test scripts could not be successfully executed due to missing functions. Testing of reports critical to taxing entities could not be completed prior to Go-Live due to the late delivery of this functionality by TR. Test results were tracked and signed-off prior to go-live, despite being incomplete.</p>

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Proc. No.	Procedure	Finding
6	<p>Go/No-Go Decision Making Process:</p> <ul style="list-style-type: none"> • Inspect project management documentation, interview members of TAD management, Thomson Reuters, and any taxing entities that participated in go/no-go decision making process to determine whether: <ol style="list-style-type: none"> a) A quality control review was performed by TAD or Thomson Reuters personnel prior to go-live; b) Stakeholders were informed of status of any incomplete functionality relating to business functional and technical requirements; c) Stakeholders were informed of any risks due to incomplete or inadequate testing. 	<p>a) No formal assessment of readiness for Go-Live was conducted, and no mitigation steps to address missing modules and functions were prepared. Go-Live proceeded as scheduled even though the number of unresolved critical faults increased in the months leading to Go-Live and several issues identified as roadblocks had not been remediated or mitigated. TAD signed off on User Acceptance Testing prior to Go-Live despite the inability to run 100 test scripts marked as High or Critical due to incomplete or missing modules and functionality.</p> <p>Due to the direct changeover method utilized by TAD to transition from the legacy mainframe system to the Aumentum system, no additional quality review activities such as report validation could occur against the legacy system.</p> <p>b) Internal TAD stakeholders were aware of the status of incomplete functionality of the various modules such as Assessment Administration (AA), and Case Management and their potential impact to various processes. However, TAD did not inform external stakeholders such as taxing entities and their vendors of the status of incomplete functionality including the ability to produce the necessary deliverables for those entities.</p> <p>TAD did not communicate to taxing entities that property valuations were no longer being updated with new sales data for the period between August 2014 and October 2014. The impact of this project management decision to convert sales data in August 2014 and subsequent cessation in new sales data entry was not fully understood by TAD at the time due to unfamiliarity with Aumentum system design and architecture.</p> <p>c) Internal TAD stakeholders were made aware of incomplete testing and associated risks at Go-Live, although the external stakeholders (taxing entities) were not.</p>

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Proc. No.	Procedure	Finding
7	<p>Post-implementation Issues:</p> <ul style="list-style-type: none"> • Inspect post-implementation issues logs, interview members of TAD management, Thomson Reuters, and taxing entities to determine whether: <ol style="list-style-type: none"> a) Post-implementation issues were identified and tracked by the project team; b) Issues identified and tracked were prioritized based on the affected business functional and technical requirements; c) Root cause analysis was performed against post-implementation issues to ensure that any solution addresses the overall problem; d) Post-implementation issues were resolved in a timely manner according to the needs of TAD management. 	<ol style="list-style-type: none"> a) A formal post implementation analysis has not been conducted to determine whether project objectives have been met. However, it was determined that post-implementation issues were identified and tracked by the project team. b) Issues identified by the project team were prioritized during weekly meetings between TAD management and TR. c) Root cause analysis was not performed against post-implementation issues. As a result, multiple issues previously corrected through hotfixes re-occurred following subsequent hotfix releases and new software versions. For example, as of July 2016, several critical reports for tax entity processes were determined to contain errors which were first identified and reported in the initial reports generated post Go-Live in 2014, and which had been resolved multiple times. d) New and ongoing issues affecting functions critical to taxing entities processes have remained unsolved for periods of up to two years post go-live. More than 40 broad requirements remain at least partly unfulfilled as of October 2016.

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Proc. No.	Procedure	Finding
8	<p>Ongoing Thomson Reuters Activities:</p> <ul style="list-style-type: none"> Inspect Thomson Reuters status reports, ongoing project plans and other communications, interview members of Thomson Reuters, TAD management and relevant taxing entities to determine whether planned ongoing Thomson Reuters activity addresses the high priority outstanding post-implementation issues. 	<p>Results for this procedure were limited by our lack of direct access to TR personnel actively involved with the development, project management, implementation, and ongoing maintenance of the Aumentum system at TAD.</p> <p>While ongoing TR activity is intended to address bugs and issues as reported by TAD, the timeliness of solutions and testing performed prior to delivery remain ongoing concerns. Also, it was determined through analysis that version upgrades, updates and patches designed to address missing or broken functionality have caused additional issues or broken existing functionality which is symptomatic of incomplete testing prior to deployment. At the behest of TAD, TR has formed "Tiger Teams" to address ongoing system issues.</p> <p>TR changed software development methodologies from traditional Waterfall to Agile during the development phase of the Aumentum project, introducing additional risks of delays, and lost institutional knowledge stemming from the change in methodology.</p> <p>Outstanding Aumentum features due for delivery in April 2015 were not implemented until March 2016 with the release of version 10.04.</p>
9	<p>TAD IS Activities:</p> <ul style="list-style-type: none"> Inspect internal IS department status reports, annual plans and budgets, interview TAD management personnel to determine the existence of a plan to address any ongoing Aumentum system issues that are beyond the scope of Thomson Reuters' planned activities.* 	<p>Starting in early 2016, TAD formed an internal Quality Assurance (QA) team to check and validate the reports delivered to external entities. The team has worked closely with taxing entities and their vendors to internalize some of the data validation steps that were causing New Change Delete (NCD) reports to have erroneous values.</p> <p>TAD and TR have initiated a joint "Blue Chips Taskforce" to track, resolve, and implement fixes and updates that address critical and high priority bugs and feature requests. System operations have stabilized as a result of TAD's efforts, however, missing functionality and bugs persist in patches delivered by TR.</p>

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AUMENTUM INDEPENDENT VERIFICATION & VALIDATION PROCEDURES
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**MANGEMENT'S RESPONSE
(NOT SUBJECT TO THE AGREED UPON PROCEDURES ENGAGEMENT)**

Proc. No.	Management's Response
1	The Software Design Matrix (SDM) was developed as a list of requirements by our Chief Information Officer at the time. The CIO subsequently retired. While the SDM may not have fully detailed all requirements, an ensuing GAP analysis supplemented this document to ensure the required functionality was identified and fully incorporated within Aumentum. TAD is working regularly with TR to leverage their resources so required functionality will benefit TAD and its key stakeholders going forward.
2	An internal draft analysis of overall cost and potential savings was estimated in 2010 prior to vendor selection. Primarily, this estimate was done for consideration of loan terms if TAD made a decision to borrow funds to pay for the software. The decision was made not to borrow and not to increase the annual budget, but to pay for the software through savings in individual budget years that transpired during the procurement and conversion process prior to any final payments coming due. Since those initial assumptions were made in the 2010 analysis, and after the selection and procurement process was underway, many of the assumptions were modified. Examples of assumptions that changed include: retention and reallocating of some existing staff, shifts in responsibilities between departments rather than workforce reductions or layoffs, retaining of the original imaging system software and support personnel and transitioning former mainframe support personnel to PC support helpdesk. Because we had to continue working with TR to stabilize aspects of their software, we also contracted with a third party consultant to provide technical expertise.
3	<p>a) TAD fell short initially in communicating to the taxing units we serve. TAD could have involved the vendors of our external stakeholders earlier in the process and should have communicated the substantive changes associated with the new software sooner. As a result of lessons learned, we have implemented several initiatives to ensure better communications between TAD and its external stakeholders going forward. The following is a list of some of those initiatives.</p> <p>Formation of a TAD Technology Transition Team: For any substantive software change or update, this team will be provided an overview of the changes by the vendor that will document the vendor's internal testing and test results and, when applicable, provide a simulation for the team. With this information, the team will consider what simulation, testing and/or pilot project TAD should undertake before the full implementation of the change. This team will be composed of members from TAD staff, staff from the tax offices and staff from four taxing entities served by TAD.</p> <p>Tarrant Appraisal District and Tax Office Liaison Team: This team will communicate more regularly concerning issues about supplemental reports, tax rolls and others that are produced regularly and provided to the tax offices. The team will plan to meet on a monthly basis. The Chief Appraiser will provide an overview directly to the offices before the information is formally transmitted.</p> <p><i>(continued on next page)</i></p>

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Proc. No.	Management's Response
3	<p>Tax Agent Advisory Team: TAD has developed a professional tax agent advisory team. Tax agents are individuals that represent property owners on a variety of property tax matters. Input from this group can provide the district with valuable information. Four agents will meet with the TAD executive team semi-annually. This agent team will provide advice and feedback pertinent to the professional agent community. Any policy changes or initiatives resulting from the Team will be communicated to the entire agent community.</p> <p>Agendas, Information Packets and Minutes of TAD Board Meetings on a more powerful TAD.org website: TAD's web portal, TAD.org is being enhanced to provide better and faster access to data and services. As a part of this enhancement it is our intent to continue to provide Board Meeting agendas and add informational packets, and meeting minutes of the meetings to the offering. Focus groups are being utilized in this process to brainstorm ideas and enhancements.</p> <p>Annual "TAD U" for elected and administrative public sector leaders: TAD will begin an annual "TAD University" for elected and administrative sector leaders to communicate the "how's and why's of the property tax laws and procedures as it relates to appraisal districts and the entities we serve. We recognized that processes can be very complex and we want to help others less familiar get a good understanding of the property tax system and the relationships between organizations that share responsibilities of the tax system.</p> <p>Annual "TAD U" for the public: We also see value in providing the same information provided to elected and administrative leaders to the public. We regularly speak at local community homeowner associations and similar events. We provide answers to the community's questions and assist them in obtaining any tax breaks for which they are entitled. In that vein, we are proposing an annual "TAD University" for them as well.</p> <p>Director of Communications: It is our intention, with the approval from our Board of Directors, to put in place an individual that oversees communication and coordination initiatives for TAD. This person will be a member of the executive team and will be included in discussion of issues related to these initiatives and others to help carry out the vision we have moving forward. They will work with the media as needed and in communication with our partner entities.</p> <p><i>(continued on next page)</i></p>

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Proc. No.	Management's Response
3	<p>In addition to other initiatives implemented, one primary goal is to establish better communications with key stakeholders. The taxing units of Tarrant County, along with the tax office's we serve, are considered our key stakeholders. We maintain a comprehensive list of these taxing units and look to continue direct communications with them. Monthly face to face meetings, addressing appraisal activities, answering question they have and distributing status reports have been taking place for over a year.</p> <p>b) TAD's original project manager was from the Information System department and had experience in project management activities. A project management team was created and two additional TAD staff members were selected to assist in this effort. These two employees, assisting with project management, were from the appraisal sector and considered subject matter experts. During the implementation process, the original project manager made a personal decision to retire from TAD. A replacement of project manager had to be selected. The decision was made to assign one of the project management team to assume the role of project manager. This individual had been involved from the beginning and was the most knowledgeable of the current implementation activities. TR expressed no objection and felt the second in command of the TAD project management team was a reasonable choice to finish the implementation process. TAD did engage Mr. Myers, an outside consultant, to assist with quality assurance, and the post implementation process.</p> <p>With the benefit of hindsight, contracting with an outside project management consultant would have provided the district with more vendor management and project management oversight. While Mr. Myers responsibilities were focused on quality assurance and review, he has since aided staff in the project management role.</p>
4	<p>a) The Software Design Matrix (SDM) was developed as a list of requirements by our Chief Information Officer at the time. The CIO subsequently retired. While the SDM may not have fully detailed all requirements, an ensuing GAP analysis supplemented this document to ensure the required functionality was identified and fully incorporated within Aumentum. TAD is working regularly with TR to leverage their resources so required functionality will benefit TAD and its key stakeholders going forward.</p> <p>b) TAD relied on TR to provide technical expertise. However, TAD has learned through this process the need for more vendor management, project management and oversight. As a result, TAD has hired an outside consultant to assist with that vendor management and oversight and going forward we would not proceed without this involvement.</p>

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Proc. No.	Management's Response
5	<p>a) TAD relied on the technical expertise of TR to provide adequately for the testing of patches and releases prior to installation into the test or production environments. TR is contractually obligated to provide customization of the software to be compliant with all relevant Texas statutes. The District has engaged an expert to help remediate the past shortcomings with this vendor, but also to help the District with vendor management responses on an ongoing basis. Additionally, before any major upgrade to the Aumentum software, the TAD technology team will review and evaluate all testing performed by TR prior to loading any upgrades</p> <p>b) Testing was not as comprehensive as it could have been but TAD relied on TR to address outstanding faults. User acceptance testing was performed by a number of TAD internal stakeholders. As faults were discovered they were reported to TR for review and final correction. In consultation with department managers, supervisors, and subject matter experts, many of whom were involved directly in user acceptance testing, the unanimous final decision was made to go live with the functionality currently in place. The understanding among that group and with TR was that the case management module would be supplemented later. As a safeguard, case management activities could be processed just as they were with the obsolete legacy system. In addition, we also relied on TR product management and technical expertise to provide additional advice and guidance concerning the go-live decision. As a result of lessons learned, no patch, hotfix or upgrade will be installed without thorough testing from TAD internal stakeholders and review of the technology team.</p>

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Proc. No.	Management's Response
6	<p>a) TAD relied on TR and their expertise in product implementation and installation. Testing was not as comprehensive as it could have been due to delays on TR's part. The go-live decision was a collective decision made by TAD management and directors. Consultation with department managers, supervisors, and subject matter experts, involved directly in the testing process, provided feedback in making the go-live decision. Before a final decision was made, buy-in from over 40 internal stakeholders was obtained and the final decision was a unanimous decision to go live with the functionality that was currently in place and with an understanding the case management module would be supplemented later. As a safeguard, case management activities could be processed just as they were with the obsolete legacy system. In addition, we also relied on TR product management and technical expertise to provide additional advice and guidance concerning the go-live decision.</p> <p>Prior to the go-live decision, TAD consulted with similar appraisal districts, which had previously converted from a mainframe environment, regarding the option to run dual systems during conversion or to stop the use of the Legacy system and go forward with the Aumentum system alone. Their advice was to operate in a single system environment rather than a dual system. We also discussed these options with TR staff and they concurred with not running dual environments. An additional complication to running a dual environment with the legacy system was the untimely passing of the chief architect of the legacy mainframe software prior to the go-live decision. The potential loss of key personnel was specifically pointed out by the consulting firm that advised the district to move away from this mainframe platform to a COTS environment. Unfortunately, they were correct in that assessment. Without his oversight, continuation in the mainframe environment would not have been without its own set of challenges. Going forward, TAD has implemented a quality assurance team to review and validate data before it is released to external stakeholders, and continues to perform in-house ratio studies and statistical analysis to evaluate appraisal performance levels.</p> <p><i>(continued on next page)</i></p>

"obtained"

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Proc. No.	Management's Response
6	<p>b) TAD relied on TR and their expertise in product implementation and installation. As the expert, they failed to properly notify TAD of software design changes, which were significant to our business processes, which created the conditions under which sales entry was tied directly to ownership transaction entry. Delays in entry of ownership for three to four months prohibited the entry of some collected sales data.</p> <p>Delays in the entry of data were not acceptable; as a result, certain sale data was not available for use at the beginning of the 2015 appraisal process. This issue was resolved and all known sale information was available for use in the 2016 reappraisal cycle.</p> <p>TAD expressed to TR from the beginning the importance of delivery of full functionality in time to share with our external stakeholders. Going forward, TAD has worked diligently with the tax office to remedy any issues with the NCD process. TAD has implemented a quality assurance team to further review all aspects of the NCD process. Additionally, TAD added technical staff specializing in mass appraisal software and SQL language, to automate certain review/audit functionality.</p> <p>c) TAD acknowledges that there was a lack of sufficient communications with external stakeholders during periods leading up to go-live. The district has undertaken steps since then to establish better communications with key stakeholders. The taxing units of Tarrant County, along with the other tax offices we serve, are considered our key stakeholders. We maintain a comprehensive list of these taxing units and look to continue direct communications with them. Face to face meetings occur monthly addressing appraisal activities, answering any questions and distributing status reports. These monthly meetings have been taking place for over a year.</p>

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Proc. No.	Management's Response
7	<p>a) The Independent Verification & Validation review is currently in process. TAD relied upon legal counsel for guidance, development and negotiations of the contract with TR. Unfortunately, a post implantation review was not included as an item in the contract. Based on feedback received from others, the TAD's board of directors initiated an IV&V review.</p> <p>b) TAD relied on TR and their expertise in product implementation and installation. Testing was not as comprehensive as it could have been. Going forward, TAD will continue to operate in a manner that focuses on vendor and project management with TR. TAD will also rely on its technology team to review and test any future enhancements, upgrades, patches or hot fixes prior to installation into TAD production environment that provides accurate deliverables. The TAD quality team will work to ensure that deliverables are consistent and error-free.</p> <p>c) The implementation and conversion of TAD's legacy system into the Aumentum environment has not fully met our expectations. We continue to work with TR to remedy that fact. Learning from this experience, we have improved communications with our stakeholders and are committed to continually improve the functionality of the system and work to better understand, and thus better serve the needs of our internal and external stakeholders.</p> <p>With the benefit of hindsight, our understanding of project management and vendor management has evolved over this process. We would be insistent on including additional contract requirements for items such as an independent post implementation review prior to final acceptance and would develop a much more comprehensive requirements document.</p> <p>While we acknowledge the challenges we have faced during this process, we do believe the software and its functionality is much improved and has much to offer all parties.</p> <p>In 2016, TAD has been able to produce over 500,000 appraisal notices, processed a record number of protests, certified the appraisal roll in a timely manner and supplied the tax offices with the necessary data required to produce tax statements and allow them to begin the collection of taxes. TAD is committed to continued improvement in the areas that have been noted and by these diligent efforts intend to prove the organization worthy of the trust it has been afforded in the past.</p> <p>As a result of lessons learned, TAD has already implemented certain initiatives intended to regain the trust and confidence of our external stakeholders and the public:</p> <p><i>(continued on next page)</i></p>

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Proc. No.	Management's Response
7	<p>With this information, the team will consider what simulation, testing and/or pilot project TAD should undertake before the full implementation of the change.</p> <p>Formation of a TAD Technology Transition Team: For any substantive software change or update, this team will be provided an overview of the changes by the vendor that will document the vendor's internal testing and test results and, when applicable, provide a simulation for the team.</p> <p>Tarrant Appraisal District and Tax Office Liaison Team: This team reviews all data including new accounts, changed accounts and deleted account reports (NCD's), tax rolls and others that are produced regularly and provided to the tax offices.</p> <p>Professional Tax Agent Advisory Team: With the goal of developing more outside involvement, TAD has established a professional tax agent advisory team. Tax agents are individuals that represent property owners on a variety of property tax matters. Input from this group can provide the district with valuable information.</p> <p>Four agents will meet with the TAD executive team semi-annually. This agent team will provide advice and feedback pertinent to the professional agent community. Agents will be selected for this team by the Chief Appraiser and approved by the TAD Board of Directors. Team members will serve for two years. These meetings will be informal round table discussions to encourage conversation and free flow of ideas. Any policy changes or initiatives resulting from the Team will be communicated to the entire agent community.</p> <p>The Team should also attend an annual overview meeting to be held for all agents previewing the upcoming tax season.</p> <p>Annual "TADU" for elected and administrative public sector leaders: As previously announced, TAD will begin an annual "TAD University" for elected and administrative sector leaders to communicate the "how's and why's of the property tax laws and procedures as it relates to appraisal districts and the entities we serve. We recognized that processes can be very complex and we want to help others less familiar get a good understanding of the property tax system and the relationships between organizations that share responsibilities of the tax system. Understanding the time demands of this group, we anticipate that this will be a 90 minute session.</p> <p>Put in place a Director of Process and Communication: It is our intention, with the approval from our Board of Directors, to put in place an individual that oversees communication and coordination initiatives for TAD. This person will be a member of the executive team and will be included in discussion of issues related to these initiatives and others to help carry out the vision we have moving forward. They will work with the media as needed and in communication with our partner entities.</p> <p style="text-align: center;"><i>(continued on next page)</i></p>

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Proc. No.	Management's Response
7	<p>TAD/TR Executive Task Force: TAD and TR meet regularly, in person or by WebEx, to discuss and review any and all concerns that still remain. These meetings bring focus and accountability to any outstanding issues.</p> <p>TAD Quality Assurance Team: TAD established a quality assurance team to review all NCD deliverables. Their assignment is to review data that will be transmitted to the tax offices to ensure quality of the product and accuracy of the deliverables. In addition, programming staff is working with the team to automate the repetitive aspects of this review to increase efficiency and accuracy.</p> <p>Outside Technology Resource Consultant: TAD has hired Kurt Myers as an outside consultant to assist in many areas of the Aumentum system. Mr. Myers has experience in the development of computer assisted mass appraisal (CAMA) database software like Aumentum. In addition to owning his own CAMA software company, he was also a former employee of CAMA software developer, Manatron.</p> <p>Stabilization of the Aumentum System: TAD has worked with TR staff members on site to address concerns and issues when they come up. TAD has assembled internal staff members to perform regression testing on patches or hotfixes prior to implementation. TAD has also hired an additional technology resource employee with specific experience in mass appraisal software development.</p> <p>TAD Aumentum User Group: The TAD users group is an ad hoc group of internal stakeholders. They meet regularly to discuss functionality, review TAD's business practices, test new patches and hot fixes, provide training to other employees, provide user feedback to TR and the appraisal district.</p> <p>Work to improve Totals Reports and estimates: In 2015 estimates reported to the taxing entities were not consistent and accurate as they should have been. TAD reported these issues to TR. For the 2016 appraisal year, through remediation efforts on the part of TAD and TR, value estimates provided between April and June returned to the level of accuracy experienced in past years. In addition, TAD certified its 2016 appraisal roll by July 25th, as required by state law, and provided totals reports to all taxing units. TAD provided a certified data extract to the tax offices for the purpose of creating and delivering tax bills.</p>

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8	<p>It is true that full functionality of the mineral import process wasn't received until June 2016; however, partial functionality was available and a work-around process allowed TAD to import 2015 data and produce a 2015 mineral appraisal roll. TAD has learned through this process the need for more vendor management and oversight. As a result, TAD has hired an outside consultant to assist with vendor and project management and oversight and going forward we would not proceed without this involvement.</p> <p>Holding the vendor to stated milestones is an important part of vendor and project management. As a result of missed milestones, TAD has withheld payment in the past. Our increased commitment to vendor management will reemphasize our insistence that TR meet it's agreed upon obligations. Going forward, TAD will continue to hold TR to milestone expectations.</p>
9	<p>TAD relied on TR and their expertise in product implementation and installation. Testing was not as comprehensive as it could have been due to delays on TR's part. The District has engaged an expert to help remediate the past shortcomings with this vendor, but also to help the District with vendor management responses on an ongoing basis. Additionally, before any major upgrade to the Aumentum software, the TAD technology team will review and evaluate all testing performed by TR prior to loading any upgrades.</p>

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GLOSSARY

Term	Definition
Agile	A contemporary adaptive software development methodology adopted by Thomson Reuters for Aumentum development in 2016.
Aumentum	Thomson Reuters' CAMA solution.
Blue Chips Taskforce	TAD & TR's joint taskforce; this team is comprised of the TAD and TR executive oversight group that are managing issues with the Aumentum software. They are apprised on updates and provided overviews of the current status of the software and they also review upcoming deployment plans, conduct long range planning and prioritize future efforts. The primary activities of the group is the focus on "blue chip issues" which are items of upmost interest and have the potential for the largest impact on improved operation of the Aumentum software.
CAMA	Computer assisted mass appraisal software of which GRM and Aumentum are examples.
COBIT 5	Control Objectives for Information and Related Technologies is a framework created by international professional association ISACA for information technology management and governance.
COTS	Commercial off-the-shelf is a term used to describe the purchase of packaged solutions which are then adapted to satisfy the needs of the purchasing organization, rather than the commissioning of custom made solutions.
Direct Changeover	A method to change from an existing system to a new one; Although this is a simple method, versus phased or parallel changeover it takes a lot of planning..
Go-Live	The first time that a computer system can be used, after all the development and testing on it have been completed and production deployment is approved.
GRM	Government Revenue Management was Manatron's CAMA solution prior to the acquisition by Thomson Reuters.
ISACA	ISACA is an international professional association focused on IT Governance. Previously known as the Information Systems Audit and Control Association.
IV&V	<p>Independent Verification and Validation are independent procedures that are used together for checking that a product, service, or system meets requirements and specifications. These are critical components of a quality management system such as ISO 9000. The PMBOK guide adopted by the IEEE defines:</p> <p>Validation. The assurance that a product, service, or system meets the needs of the customer and other identified stakeholders. It often involves acceptance and suitability with external customers. Contrast with <i>verification</i>.</p> <p>Verification. The evaluation of whether or not a product, service, or system complies with a regulation, requirement, specification, or imposed condition. It is often an internal process. Contrast with <i>validation</i>.</p>
Legacy System	TAD's predominantly mainframe based CAMA system in place prior to Aumentum.

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Term	Definition
Manatron	The solution vendor TAD executed a contract with for GRM. Manatron was later acquired by Thomson Reuters.
QA	Quality Assurance is part of quality management focused on providing confidence that quality requirements will be fulfilled.
RFP	A Request For Proposal is a solicitation, often made through a bidding process, by an agency or company interested in procurement of a commodity, service or valuable asset, to potential suppliers to submit business proposals. It is submitted early in the procurement cycle, either at the preliminary study, or procurement stage.
SOW	A Statement of Work (SOW) is a document routinely employed in the field of project management. It defines project-specific activities, deliverables and timelines for a vendor providing services to the client. The SOW typically also includes detailed requirements and pricing, with standard regulatory and governance terms and conditions. It is often an important accompaniment to a Master Services Agreement or Request for Proposal (RFP).
System Integration Testing	System integration testing (SIT) involves the overall testing of a complete system of many subsystem components or elements. The system under test may be composed of hardware, or software, or hardware with embedded software, or hardware/software with human-in-the-loop testing.
TAD	Tarrant Appraisal District
TADU	Tarrant Appraisal District University – a forum for TAD’s external stakeholders.
Tiger Teams	A tiger team is a group of experts assigned to investigate and/or solve technical or systemic problems.
TR	Thompson Reuters
User Acceptance Testing	Formal testing with respect to user needs, requirements, and business processes conducted to determine whether a system satisfies the acceptance criteria and to enable the user, customers or other authorized entity to determine whether or not to accept the system
Waterfall	A sequential (non-iterative) design process, used in software development processes, in which progress is seen as flowing steadily downwards (like a waterfall) through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance.

6. Information Item

Report by Taxpayer Liaison Officer

Taxpayer Liaison Officer Monthly Report To TAD Board of Directors

February 2021

Category	Year 2020	January 2021	February 2021	March 2021
HS Exemption	15			
Over 65 Exemption	4			
Disabled Vet Exemption	1			
Statement Copies	5			
Ownership	17	1		
Value Statement or Value Increase				
Password/PIN	6			
BPP Rendition	1			
Taxes	13	2	1	
How to Protest	9			
ARB Hearings	6		1	
Status of Protest	1			
Tax Code	2			
Vehicle Inventory Tax	1			
Totals	81	3	2	

Prepared by:

Shirley Jacobson

Taxpayer Liaison Officer

March 19, 2021