



REQUEST FOR PROPOSALS
FOR A
MASS APPRAISAL SYSTEM

Galveston Central Appraisal District
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GALVESTON CENTRAL APPRAISAL DISTRICT REQUEST FOR PROPOSALS (RFP) FOR COMPUTER-ASSISTED MASS APPRAISAL (CAMA) SYSTEM RFP No. GCAD-2025-CAMA

1. INTRODUCTION & PURPOSE

The Galveston Central Appraisal District (“GCAD”) is soliciting proposals from qualified vendors to provide a fully cloud-hosted, enterprise-grade Computer-Assisted Mass Appraisal (“CAMA”) system that supports GCAD’s statutory responsibilities under the Texas Property Tax Code, Comptroller Property Tax Assistance Division (PTAD) requirements, Uniform Standards of Professional Appraisal Practice (USPAP), and the International Association of Assessing Officers (IAAO) standards.

The selected CAMA system must improve appraisal accuracy and uniformity, increase operational efficiency, support modern online taxpayer and agent services, and provide a secure, auditable platform for all appraisal, appeals, litigation, and related activities.

GCAD is a political subdivision of the State of Texas. GCAD is responsible for the appraisal of property in Galveston County for ad valorem tax purposes as charged by Texas law. The appraisals performed by GCAD are used by taxing units to calculate and allocate the annual tax burden. In addition to appraising property, GCAD implements other provisions of law, such as making determinations on exemptions, performing statutorily defined special-use appraisals, and supporting an administrative protest process for property owners, among other duties and responsibilities.

GCAD currently performs appraisals and other services for approximately 211,600 parcels of property, supporting 82 taxing unit jurisdictions (including eight independent school districts) with a total market value exceeding \$77.73 billion.

2. PROJECT GOALS & OBJECTIVES

2.1 Appraisal Accuracy & Transparency

- The system must support cost, income, and market approaches to value for various property types, including but not limited to real property (including improvements) and business personal property, and including various property types, such as residential, multi-tenant residential, commercial, mineral, complex industrial, among others.
- The system must include tools for equity value analysis, ratio studies, and statistical performance monitoring.
- The system must maintain a complete audit trail of all CAMA entries and modifications, including user, date, time, and reason.

- The system must support reproduction of value conclusions for ARB, Litigation, Arbitration, and audit purposes.

2.2 Staff Efficiency & Workflow

- The system must include configurable workflow tools that allow GCAD to define, assign, and track tasks across all departments.
- The system should have support for OCR document processing to minimize manual data entry.
- The system must support queue-based work management with user- and role-specific worklists.
- The system must automate repetitive tasks where feasible while preserving manual reviews where required by policy or law.

2.3 Digital Services

- The system must support or work with other vendors to include a secure taxpayer portal for appeals, document submission, and account inquiry.
- The system must support an agent portal for mass representation, bulk filings, and evidence exchange.
- The system must support online scheduling and management of ARB and informal meetings.
- The system must support integrated virtual hearings or integrate with commonly used virtual meeting platforms.

2.4 Cloud Hosting & Availability

- The system must be delivered as a fully cloud-hosted Software-as-a-Service (SaaS) solution.
- The hosting environment must provide a minimum of 99.9% up-time, measured on a monthly basis, excluding scheduled maintenance windows agreed to by GCAD.
- The hosting provider must support geographic redundancy and disaster recovery capabilities with an RTO of 6 hours or less for critical services.
- The vendor must provide details of the data center locations, certifications, and security controls.

2.5 Compliance & Security

- The system must comply with applicable provisions of the Texas Property Tax Code, particularly those governing appraisal records, notices, protests, and roll certification.
- The system must support compliance with USPAP Standards 5 & 6 – Mass Appraisal and applicable IAAO standards.
- The system and hosting environment must be covered by a current SOC 2 Type II report, or the vendor must provide a detailed timeline and interim controls if certification is in progress.
- The system must support end-to-end encryption, strong access controls, and auditable security logging.

3. SCOPE OF WORK

The selected vendor will provide all software, hosting, implementation services, data conversion, training, and ongoing support necessary to deliver a fully functional CAMA system. Including the following, at a minimum:

3.1 Core Appraisal Functionality – Market & Income Approaches

- Support market (sales comparison) approaches, including comparable selection, automated adjustment grids, and reconciliation tools.
- Support income-based valuation for appropriate property types, including configuration of potential gross income, vacancy, operating expenses, capitalization rates, and yield capitalization where applicable.
- Allow GCAD to define and maintain market models, schedules, and calibration parameters with effective dates and versioning.
- Provide tools for performing ratio studies, sales chasing analysis, and other statistical performance measures consistent with PTAD and IAAO guidelines.

3.2 Core Appraisal Functionality – Cost Modeling and External Cost Service Integration

The system must provide robust cost-based valuation capabilities for both residential and commercial properties, including integration with external cost services. At a minimum, the system must:

- Provide full support for cost-based valuation of residential, commercial, industrial, and special-use improvements.
- Provide the capability to integrate with current cost manual services, including but not limited to Marshall & Swift / SwiftEstimator (CoreLogic), RSMeans, or equivalent cost data providers.
- Allow import, update, and application of Marshall & Swift or equivalent cost schedules, including automatic adjustment for local cost multipliers, construction types, occupancy types, and quality classes.
- Support depreciation modeling, including physical deterioration, functional obsolescence, and external (economic) obsolescence, using configurable tables and factors.
- Automatically calculate replacement cost new (RCN), replacement cost new less depreciation (RCNLD), and contributory value for improvements, with full audit traceability.
- Maintain version control of all cost tables, including effective dates, and allow users to view and apply historical cost tables for prior-year valuation and audit support.
- Allow GCAD to define user-specific cost classes, modifiers, and local adjustments while preserving vendor-provided base cost schedules.
- Produce transparent calculation sheets for each improved property showing the key cost assumptions, quantities (e.g., square footage), cost rates, time adjustment indices, depreciation, and final calculated values.
- Integrate cost-derived values with income and market valuation modules to support reconciliation and documentation of the final value conclusion.

- Provide a method for preserving historical cost tables and calculation logic for use in ARB hearings, Litigation, Arbitrations, and Comptroller/PTAD reviews.

3.3 Protests, Appraisal Review Board, Arbitrations, Appeals, and Litigation

- Support electronic protest filing by property owners and agents, including the ability to attach supporting documents.
- Automatically create and route workflow items when protests are filed, including informal and formal hearing preparation tasks.
- Provide ARB scheduling tools to manage dockets, panels, hearing times, and room assignments.
- Support generation of evidence packets, notices, and ARB orders directly from the system.
- Include modules or capabilities to track litigation, arbitration, and SOAH cases, including key dates, documents, and outcomes.
- Support recording of settlement agreements and automatic creation of roll corrections where appropriate.

3.4 Workflow, Reporting, and Business Intelligence

- Provide a configurable workflow engine that allows GCAD to define work types, routing rules, approvals, and service-level targets.
- Include business intelligence (BI) reporting tools that enable GCAD staff to design, save, and run reports without vendor intervention.
- Allow scheduled report generation and automatic distribution via email or secure portal to authorized users.
- Provide dashboard capabilities to present key performance indicators (KPIs), workload metrics, and appraisal performance metrics.

3.5 Public and Agent Portals

- Provide a secure taxpayer portal that supports property search, online protest filing, uploading documents, viewing notices and tax-related information as permitted by law.
- Provide an agent portal that supports representation of multiple accounts, bulk protest filing, mass downloading of evidence and notices, and secure communication with GCAD.
- Support online submission of homestead applications, business personal property renditions, and other commonly requested forms, with appropriate validation and routing into workflow queues.
- Provide clear audit logs of portal activity linked to the corresponding appraisal records.

4. TECHNICAL REQUIREMENTS

4.1 System Architecture

- The system must be delivered as a fully cloud-hosted Software-as-a-Service (SaaS) solution.

- The system must be accessible via a modern web browser (Google Chrome is required; support for other browsers is preferred).
- The architecture must support horizontal and/or vertical scalability to accommodate growth in parcels, users, and processing needs.
- The vendor must describe the application architecture, including tiers, load balancing, and multi-tenancy where applicable.

4.2 Database & Data Access

- The system must use a relational database management system (RDBMS) such as Microsoft SQL Server, PostgreSQL, or an equivalent enterprise-grade platform.
- The system must provide GCAD with the ability to run ad hoc queries and produce exports via ODBC, JDBC, or other secure methods approved by GCAD.
- The system must maintain referential integrity and provide controls to prevent orphaned or inconsistent data relationships.
- The vendor must describe data backup, retention, and point-in-time recovery capabilities along with any associated costs.

4.3 Cost Services Interface (Marshall & Swift / Other Providers)

The system must support robust integration with external cost services that are widely used in the appraisal industry. At a minimum, the system must:

- Support API-based, web-service, or secure file-based integration with Marshall & Swift / SwiftEstimator (CoreLogic) and other recognized cost service providers or provide equivalent embedded cost data with similar functionality.
- Allow GCAD to select and configure cost models by property type, occupancy type, construction class, quality grade, and other relevant classification attributes.
- Maintain strict version control of all imported or embedded cost tables, including effective dates, notes, and the ability to view prior versions.
- Automatically apply local and regional construction cost indices, time adjustment factors, and location modifiers in accordance with the cost service provider's methodology.
- Support configuration and application of depreciation schedules, including physical, functional, and external components, and support the definition of custom depreciation tables by GCAD.
- Expose detailed cost calculations in a user-friendly format for hearings and litigation, including quantities, base costs, modifiers, indexes, depreciation, and final value conclusions.
- Enable GCAD to preserve historical cost tables and calculations for prior years to support ARB hearings, litigation, Comptroller/PTAD reviews, and internal quality control audits.
- Provide clear documentation of how cost data is updated (frequency, process, and testing) and allow GCAD to control when new cost tables are promoted into production.
- Support reconciliation between cost-derived values and market and income approaches, including the ability to document the final reconciled value and rationale.

4.4 Security & Compliance

- The system and hosting environment must be covered by the current SOC 2 Type II report. If the report is in progress, the vendor must supply evidence of interim controls and an estimated completion date.
- All data in transit between client browsers and the hosting environment must be encrypted using TLS 1.2 or higher.
- All data at rest must be encrypted using industry-accepted methods and key management practices.
- The system must support multi-factor authentication (MFA) for administrative and remote access and must allow GCAD to enforce password and session policies.
- The vendor must maintain detailed security logs and provide GCAD with access to security event information relevant to GCAD's data and usage.
- The vendor must have an incident response plan and must notify GCAD promptly in the event of a security incident affecting GCAD data.

4.5 Accessibility

- The system, including public-facing portals, must substantially comply with WCAG 2.1 AA accessibility guidelines.
- The vendor must provide a current Voluntary Product Accessibility Template (VPAT) or equivalent documentation describing accessibility conformance.
- The system must be usable with common screen readers and assistive technologies.

5. DATA CONVERSION REQUIREMENTS

- Vendor must provide a detailed data conversion plan covering all existing GCAD appraisal, ownership, exemption, and related data.
- Vendor must convert at least ten (10) years of historical appraisal data, or an alternate period proposed by the vendor and approved by GCAD.
- Vendor must convert associated documents, images, and roll history where technically feasible.
- Vendor must support multiple test conversions and provide validation tools and reports to confirm accuracy before final cutover.

6. IMPLEMENTATION REQUIREMENTS

- Vendor must assign a dedicated Project Manager as the primary point of contact for the duration of the implementation.
- Vendor must provide a detailed project plan including tasks, deliverables, dependencies, and timelines.
- Users, customer service, and ARB support staff.
- Vendor must support a parallel operations period, during which the legacy system and new system are run concurrently until GCAD confirms functional readiness and data accuracy.

7. SERVICE LEVEL REQUIREMENTS

- Vendor must provide a minimum production system uptime of 99.9% measured monthly, excluding scheduled maintenance windows.
- Vendor must respond to critical issues within 1 hour and provide status updates until resolution, not to exceed 48 hours between updates.
- Vendor must conduct at least one annual disaster recovery test that includes GCAD's environment and provide a summary report.
- Vendor must provide GCAD with access to a support portal and case tracking system.

8. EVALUATION CRITERIA

Proposals will be evaluated using the following criteria:

- Technical Merit & Functionality – 30%
- Vendor Experience & References – 20%
- Implementation Plan & Project Management – 15%
- Usability & Demonstration – 15%
- Cost Proposal – 15%
- Cybersecurity & Hosting – 5%

GCAD reserves the right to consider all factors it deems relevant and to negotiate with vendors that meet the minimum requirements established using the above criteria to achieve the best value and platform for the District and taxpayers of Galveston County.

9. COST PROPOSAL

The Firm should supply an accurate and detailed estimate of all costs associated with procuring all necessary components of a complete CAMA system for the District. The Firm must complete the included Cost Submission Form and all other supporting documentation, along with their proposal. Please include cost information regarding the following elements:

9.1 Software License

Please provide a detailed summary of the total cost to acquire the software license for your CAMA system that will adequately serve the District's current and future needs. If necessary, please supplement specifically what the license agreement will include. (For example: does the license agreement provide only the use of the software, or will the source code be conveyed or transferred with the license agreement?)

9.2 Hardware Purchases

Please provide a detailed summary and an itemized list of the hardware requirements for your CAMA system.

9.3 Project Labor

Please provide a detailed summary of the total cost of labor associated with this

project, including the estimated number of hours to complete the project, along with the hourly rate. If the Firm does not charge by the hour, please state the total project labor cost as a flat fee.

9.4 Conversion Cost

If not included as part of the project labor cost, please provide a detailed summary of the estimated cost to convert historical data from the District's current CAMA system into the Firm's CAMA system. Please provide either the total cost to convert the current year and the past five years or the current year and the past ten years. Additionally, please provide a cost estimate to convert a single year of historical data, so the District can determine how many years it can afford to convert.

9.5 Third Party Software

Please provide any additional costs associated with third-party software required by the Firm's CAMA system that are not already included in the software license fee.

9.6 Training Cost

Please provide a detailed summary of the initial training the District's staff will receive once the installation and conversion are complete, and provide the cost associated with the training if said training is not included with the purchase of the software license fee. Additionally, and as an addendum, please provide a summary of the costs associated with additional training for District staff if this cost is not included with the annual support and maintenance fee. If additional training does entail additional cost, please provide either the flat fee cost or the hourly rate for additional training.

9.7 Cost to Modify Totals

Please provide a summation of all cost elements to modify your software, which should be detailed in the software design details matrix attached. If there were no additional cost to modify certain elements of the Firm's current system to meet the specific needs of the District, then indicate zero cost.

9.8 Total Proposed Net Cost

Please provide a summation of the total cost of the project. This cost should represent the total "out-of-pocket" cost the District should expect to pay in order to obtain a complete working CAMA system, which meets or exceeds all of the expectations of the District, from your Firm. This total cost will be net of any exceptions, additional training, annual maintenance and support, and the cost to convert any additional years of historical data.

9.9 Annual Support and Maintenance

Please provide the expected recurring annual unlimited support and maintenance for the term of any contract between the District and the Firm for the Firm's CAMA system. As an addendum to the Cost Submission Form, please detail a summary of what benefits, enhancements, or enrichments the District will receive, at no additional cost, as a result of the annual support and maintenance.

9.10 Supplemental Development

As an addendum to the Cost Submission Form, please provide a detailed summary of the estimated cost and process of future or supplemental software development. For example, when the District approaches the Firm with suggested enhancements or improvements to existing source code, are there fees associated with new development for the perceived enhancement or benefit? Financing Availability: As an addendum to the Cost Submission Form, please provide a detailed explanation of the possible financing options available to the district.

10. MANDATORY FORMS

- Vendor's Standard Contract
- Conflict of Interest and Disclosure forms as required by Texas law.
- Cybersecurity Attestation and SOC 2 Type II documentation or equivalent.
- VPAT or equivalent accessibility documentation.
- Reference List including at least three appraisal districts or similar agencies.
- Completed Pricing Workbook or Schedule.

11. PROJECT TIMELINE

1. RFP Issue Date: December 15, 2025.
- Vendor Question Deadline: January 16, 2026.
 - Proposal Submission Deadline: January 29, 2026.
 - Vendor Demonstrations: Prior to February 10, 2026
 - Anticipated Award Date: February - March, 2026

12. LEGAL & CONTRACTUAL REQUIREMENTS

- The contract resulting from this RFP will be governed by the laws of the State of Texas, with venue in Galveston County.
- GCAD will retain ownership of all data, configurations, and derivative datasets created or hosted within the system.
- Vendor may not use GCAD data for any purpose other than providing contracted services and must not retain GCAD data after contract termination except as required by law or agreed to by GCAD.
- The contract will include provisions for termination for cause and termination for convenience, with appropriate notice requirements.
- GCAD is subject to the Texas Public Information Act; the vendor must cooperate with GCAD in responding to public information requests while appropriately asserting any applicable confidentiality protections.
- Vendor shall indemnify and hold harmless GCAD from all claims arising from the system.
- As part of the proposal, the Vendor must certify that the pricing, terms, warranties, and conditions offered to GCAD are no less favorable than those offered to any

other appraisal district, governmental entity, or political subdivision within the State of Texas for substantially similar products and services.

- Vendor must acknowledge that should it offer more favorable pricing, terms, warranties, or conditions for substantially similar products or services to another Texas government entity at any time during the resulting contract terms, the Vendor will be required to disclose such change to GCAD and make those same favorable terms available to GCAD. Failure to comply with this requirement may be considered a material breach of the resulting contract.
- Any proposal, to include cost, must be valid no less than 90 days from the proposal's submission deadline.
- GCAD reserves the right to reject any or all proposals and waive informalities. Submission of a proposal does not obligate GCAD to award a contract.
- GCAD reserves the right to select the proposal deemed to be in the best interest of the district, and to select the bidder who provides goods or services at the best value for the District as described in Section 252.043 of the Texas Local Government Code.

13. BIDDER QUALIFICATIONS AND REFERENCES

- Proven implementation in at least one Texas appraisal district with 125,000+ parcels, including two complete appraisal cycles using the proposed solution.
- Vendor will provide a list of current CAMA clients along with parcel count and go-live dates.
- Provide the current software version number along with release history for the last three major releases, along with release notes for those releases.
- Please provide in detail the Firm's experience providing CAMA services to appraisal districts, or related entities, within and outside the State of Texas. Include in this description a list of jobs/clients currently under contract and/or completed within the last year.
- Please provide in detail a list of the team members that will likely be assigned to this project, if subsequently awarded, and specify their experience related to their role on the team.
- Please describe the current financial stability and solvency of the Firm and the Firm's goals to remain solvent over the long term. If available, please provide a Form 10-K or equivalent to demonstrate solvency. Please provide a statement detailing the existence of any lawsuits filed against the Firm, or by the Firm, that might result in a measurable negative financial impact on the Firm's future.
- Please provide a complete list, including contact information, of customers and/or clients the Firm provides CAMA-related software and services. Please highlight those customers that are of a similar size and complexity to Galveston CAD.
- Please provide a detailed description of your Firm's ownership, including any parent companies and/or subsidiaries, as applicable, along with the names and addresses of all principals within any of these said companies. Also include a biographical and historical sketch of the Firm detailing the dates of creation, merger, buyouts, or takeovers as applicable.

- To achieve its overall objective, the District seeks to partner with a Firm that shares common values and goals of performing the duties of property tax appraisal and seeks to advance the methodologies and theories of the industry, while at the same time striving to be a leader in IT-related solutions. Evaluation of any prospective Firm will not be limited only to technical specifications but will include other intangible assets of the Firm. Therefore, please provide a detailed internal view of the Firm, which includes mission statements, long and short-term goals, software support perspectives, software customization perspectives, software enhancement perspectives, employee staffing, and future staffing goals. Identify your vision for embracing future technology and/or enhancements, and how the Firm intends to remain competitive and on the “cutting edge” with CAMA-related software in the years to come.
- Describe in detail the Firm’s ability and methodology to provide ongoing support and technical assistance, once installation and conversion is complete, including the number of employees currently in place or that might be added to provide ongoing support to the District.
- Please provide a statement as to the Firm’s ability to begin full and complete implementation and conversion of this project once a contract is executed and finalized.

14. PROPOSAL SUBMISSION INSTRUCTIONS

Vendors must submit their proposals in accordance with the instructions set forth below. Failure to comply with these requirements may result in the disqualification of the proposal. All proposals and related documents must be submitted by an individual authorized to bind the vendor.

14.1 Method of Submission:

All proposals must include three (3) printed copies and one digital version in a sealed envelope/package. Proposals may be submitted by regular mail, hand delivery, or delivery via a reputable courier services to the address provided in the Contact Information section below. All submission packages must be received by GCAD by the Proposal Submission Deadline stated in Section 14.5. Late submissions will not be accepted regardless of delivery method.

14.2 Format Requirements:

- Digital version must be provided in **PDF format** on a USB drive.
- All copies must be provided as a **bound hard copy**.

14.3 Number of Copies:

- **At a minimum, three (3) physical copies** must be submitted for every proposal.

14.4 Labeling Requirements:

All proposal packages must be clearly labeled as follows:

- **“RFP No. GCAD2025CAMA – [Vendor Name]”**
- This label must appear on the exterior of the envelope/package.

14.5 Submission Deadline:

Proposals must be received by GCAD no later than **January 29, 2026 at 1:00 pm. Late submissions will not be accepted**, regardless of the cause of delay, including carrier delivery issues, mail delays, or technical difficulties.

14.6 Responsibility for Delivery:

The Vendor assumes all responsibility for delivery of the proposal to the designated submission location. GCAD will not be responsible for proposals that are misdirected, delayed, or otherwise not received by the stated deadline. Vendors should allow sufficient mailing time to ensure the timely receipt of the proposal.

15. System Questionnaire

System Questionnaire

A “yes” or “no” response to all sections is required.

Instructions:

1. If your software currently meets all requirements set forth in the statement or question and requires no modification, then answer “YES”.
2. If you are unable to meet all requirements, then answer “NO”.
3. If the software does not currently meet all requirements set forth in the statement or question, but you are willing to modify the system, then answer “NO” and include an estimated cost for providing the requested capability.

1. Software Application and Database Design	Yes/No	Cost to Modify
1.1. Does the vendor, within current maintenance costs, ensure legislative compliance by the bill's effective date or as soon as possible allowed by the release schedule?		
1.2. Is the application cloud-based?		
1.3. Is the application written for a dynamically scaled computing environment?		
1.4. Does the application support distributed processing server technology?		
1.5. Does the application allow for a fully redundant Windows & SQL Clustering solution to minimize downtime?		
1.6. Is the application developed for a Windows-based network environment?		
1.7. Does the application employ a Graphical User Interface for ease of use?		
1.8. Does the application have online help? If so...		
1.8.1. Is the help context-sensitive?		
1.8.2. Does it use the standard Windows “What’s This?” functionality?		
1.8.3. Are there additional tools to allow direct contact with the support staff?		
1.8.4. Does the application have step-by-step “How To” developed for common functions?		
1.8.5. Does the application have a step-by-step “How To” developed for Texas tax calendar functions?		
1.8.6. Is the online help updated when functionality is added or changed?		

1.8.7. Does the system allow for GCAD-specific procedures to be added to the online help?		
1.9. Does the application use a generally available report writer for all its forms and reports?		
1.9.1. If so, can the user make edits to the forms and reports as needed?		
1.10. Can the data be exported using industry standard formats?		
1.11. Is the application installed using standard methods on their respective platforms?		
1.12. Does the vendor utilize a structured Release Deployment Plan in order to schedule deployment and protect the end users from instability?		
1.13. Are new releases automatic?		
1.14. Is the application fully compatible with most internet browsers?		
1.15. Does the application support a read-only or kiosk mode for use in the customer service lobby?		
1.16. Does the product support user API's?		
1.17. Does the product support VOIP phone system integration?		
1.17.1. Does the integration allow for accounts to be grouped and searched by caller ID?		
1.18. Is the application capable of Optical Character Recognition (OCR)?		
1.19. Does the application maintain a one-to-many relationship between the owner table and the property/parcel table? (Can an owner have multiple properties?)		
1.20. Does the application maintain a one-to-many relationship between the property/parcel table and the owner table? (Can a property have multiple owners without splitting it?)		
1.21. Does the application allow for ownership % to be applied and maintained at the land, improvement, and personal property segment level?		
1.23. Is the number of taxing entities allowed per account unlimited?		
1.24. Does the application allow for entity % to be applied at the property level? For example, a property is 50% inside city limits, and does not have to split the account.		
1.25. Does the application allow for entity % to be applied and maintained at the land, improvement and personal property segment level?		

1.26. Does the application allow for grouping properties for the purpose of apportioning exemptions? (Can an MH property be grouped with the land property or property to apply the HS exemption without combining the properties?)		
1.27. Does the application allow for grouping properties for the purpose of apportioning value (Income Valuation, Economic Units, Effective Acres, Special Appraisal Distribution)?		
1.28. Does the application allow for prorating exemptions?		
1.28.1. If so, does the property allow for multiple prorations on the same account in the same tax year?		
1.29. Does the application support storing the tax payment status from the tax office?		
1.30. Does the application maintain a complete set of appraisal history per tax year?		
1.30.1 Is this accomplished without intervention by technical support personnel?		
1.30.2. Does this include land and improvement detail appraisal information?		
1.30.3. Does this include pricing schedules by tax year?		
1.30.4. Does this also include neighborhood adjustments by tax year?		
1.30.5. Does this also include subdivision adjustments by tax year?		
1.30.6. Does this also include cost multipliers and local multipliers by tax year?		
1.30.7. Does the application allow for calculations of value to be performed on a previous year's account?		
1.31. Does the application capture a complete set of appraisal information when a property is sold?		
1.31.1. If so, does this include land and improvement detail appraisal information?		
1.31.2. Can land and improvement detail information be modified without affecting current values?		
1.31.3. Does the application allow for configurable user warnings to manage data entry affecting new value, sales, or ARB settlement offers?		
1.32. Does the application capture new value?		
1.33. Does the application capture new value upon completion of construction?		

1.34. Does the application allow for calculations of value to be performed on appraisal information captured at the time of sale?		
1.35. Does the application allow property comparisons and ratio calculations using appraisal information captured at the time of sale, in addition to the current appraisal information?		
1.36. Is the database SQL-compliant? If so...		
1.36.1. Can it be accessed using generally available ODBC drivers?		
1.39. Is there a graphical user interface for querying the database(s)?		
1.40. Is the complete data dictionary available for querying?		
1.41. Does the application allow a user to track and report on the value status of any account?		
1.42. Does the application allow a user to reconcile multiple valuation methods to determine a final value, including cost, income, and sales values?		
1.43. Has a client experienced the total loss of access and/or visibility to an account(s)? (Example: No primary accounts)		
1.44.1. If so, could the account be retrieved or restored to the database by the vendor in less than 48 hours (about 2 days)?		
1.43. Does the system allow a one-to-many relationship between an official document (deed) table and the property/parcel table?		
1.45. Does the system maintain a chain of title?		
1.46. Does the system allow secondary documents to be recorded in parallel with the official document? (Examples: Life Estate, Heir Owner, Contract for Deed, Ground Lease, etc.)		
1.48.1. If so, does the system allow secondary parties to be listed on an account?		
1.47. Does the system maintain a person's date of birth in a separate field from an entity's date of establishment?		
1.48. Does the system maintain a person's date of death in a separate field from an entity's date of dissolution?		
1.49. Does the system recalculate values for only tax years affected by the change?		
1.50. Does the system maintain exemption and other value modifier calculations as required by Texas legislation per tax year?		
1.50.1. If so, does the system automatically adjust exemption amounts for added value or new construction?		

1.50.2. If so, does the system automatically adjust tax ceilings for added value or new construction?		
1.41. Does the system allow exemptions to be associated with a specific property owner?		
1.53. Does the system allow for an exemption type to be applicable across multiple property types?		
1.53. Does the system allow exemptions to be awarded as a percentage of appraised value?		
1.53.1. If so, does the system allow exemptions to be awarded as a percentage of land, improvement, interest, or asset?		
1.55. Does the system allow exemption amounts or percentages to vary per taxing entity?		
1.56. Does the system allow exemption amounts or percentages to vary per taxing entity per year?		
1.56.1. If so, does it require a new exemption entry each time the amount or percentage changes?		
1.57. Does the system allow exemptions or other value modifier calculations to be automatically applied based on the existing data and state laws?		
1.58 Does the system allow configurations that generate alerts and/or prevent data entry errors?		
1.59. Does the system allow flagging an account for a future inspection and a reason?		
1.60 Does the system allow flagging an account for inspection by multiple departments?		
1.61. Does the system track mailed exemption applications or other forms?		
1.62. Does the system maintain images of the received application?		
1.63. Does the system track the latest application mailed date?		
1.64. Does the system track the latest application received date?		
1.65. Does the system track late applications?		
1.66. Does the system track actions taken on applications?		

1.67. Does the system track the applicant's name for those who do not match the owner's name?		
1.68. Does the system track occupancy date?		
1.69. Does the system track income-producing Percentage?		
1.70. Does the system track the owner as Not of Record?		
1.71. Does the system track a qualifying Trust?		
1.72. Does the system track beneficiary Name(s)?		
1.73. Does the system track the beneficiary's Date of Birth?		
1.74. Does the system track cooperative Housing?		
1.75. Does the system track disability Start Date?		
1.76. Does the system track disability End Date?		
1.76.1. Does the system allow for an automatic action to be taken as of the end date?		
1.77. Does the system track veteran Disability Rating?		
1.78. Does the system track total and Permanent Disability?		
1.79. Does the system track participating Taxing Units?		
1.80. Does the system allow the user to enter future exemption start dates?		
1.81. Does the system allow the user to enter future exemption end dates?		
1.82. Does the system consider effective and termination dates and/or tax year to allow for multiple exemptions to be processed for properties?		
1.83. Does the system allow for multiple, non-overlapping exemptions to be on a property at a time?		
1.84. Can the system produce and track exemption estimates for the estimates roll within the production database?		
1.85. Does the system maintain an exemption or other value modifier change log?		
1.86. Does the system calculate and maintain appraised value limitations?		
1.87. Does the system calculate and maintain tax ceilings and freeze years?		
1.88. Does the system calculate and maintain tax ceiling transfer ratios?		

1.89. Does the system allow the tax ceiling and freeze-year participation to vary by taxing entity?		
1.90 Does the system contain any large language model or “artificial intelligence”? 1.90.1 If so, can this feature be remove or otherwise disabled?		
2. Mass Processing	Yes/No	Cost to Modify
2.1. Does the application perform a full system recalculate with the benchmark property quantities in 4 hours or less?		
2.2. Has the application been tested with a full system recalculation with the benchmark property quantities in 4 hours or less?		
2.3. Does the application generate 200,000 residential sales comparable grids in 2 hours or less?		
2.4. Has the system been tested generating 200,000 residential sales comparable grids in 2 hours or less?		
2.5. Does the application generate 200,000 residential equity comparable grids in 2 hours or less?		
2.6. Has the system been tested generating 200,000 residential equity grids in 2 hours or less?		
2.7. Does the application generate and print entity totals for all entities in 1 hour or less?		
3. Parcel/Account Search Information	Yes/No	Cost to Modify
3.1. Can the Parcel/Account be accessed by all of the following?		
3.1.1. Account Number?		
3.1.2. Geographic Number?		
3.1.3. Account Type (Real, Personal, Mineral, Mobile Home, Auto)?		
3.1.4. Include deleted and reference properties?		
3.1.5. By Year?		
3.1.6. Situs?		
3.1.7. Abstract/Subdivision, Block, Lot?		
3.1.8. Neighborhood Code or Description?		
3.1.9. DBA?		

3.1.10. Map ID?		
3.1.11. Building Permit Number?		
3.1.12. Mineral Lease Number?		
3.1.13. Previous ownership?		
3.1.14. Business type (NAICS)?		
3.1.15. Dealer's license number?		
3.1.16. Aircraft tail number?		
3.1.17. Owner/Taxpayer ID?		
3.1.18. Owner/Taxpayer Name?		
3.1.19. Owner/Taxpayer First Name?		
3.1.20. Owner/Taxpayer Last Name?		
3.1.21. Owner/Taxpayer Mailing Address?		
3.1.22. Previous Taxpayer Name?		
3.1.23. Agent's ID?		
3.1.24. Agent's Name?		
3.1.25. Agent's First Name?		
3.1.26. Agent's Last Name?		
3.1.27. Agent's Mailing Address?		
3.1.28. Entity?		
3.1.29. Year Range?		
3.1.30. Street Number Range?		
3.1.12. Block Range?		
3.1.32. Lot Range?		
3.1.33. Any Previous Taxpayer Name?		
3.1.34. Exemption Start Date?		
3.1.35. Exemption End Date?		

3.1.36. Deed Instrument Number?		
3.1.37. Deed Instrument Number Range?		
3.1.38. Deed Date Range?		
3.1.39. Phone Number?		
3.1.40. Username?		
3.1.41. Entry Date Range?		
3.1.42. Department?		
3.1.43. Exemptions?		
3.1.44. Property Use?		
3.1.45. Zoning?		
3.1.46. Value Status? (for tracking the property through the appraisal cycle)		
3.1.47. Field Assignment Group? (For mobile appraisal device)		
3.1.48. Building Permit #?		
3.1.49. UDI Properties?		
3.1.50. Deed Volume/Page/Number?		
3.1.51. Improvement Type?		
3.1.52. State Code?		
3.1.53. Map ID?		
3.1.54. SIC Code?		
3.1.55. Mobile home Serial, Title, or HUD number?		
3.1.56. Deed Volume, Page of Number?		
3.1.57. Configurable Code for Grouping Properties? (Property Group Code)		
3.1.58. ANY COMBINATION OF THE ABOVE?		
3.2. Does the system also allow for a generic/universal search using one entry box?		
3.3. Does the system have an advanced search?		
3.4. Does the system allow the use of wildcards (% , *) in the search criteria?		

3.5. Do all search results display basic data fields, including account number, situs, owner name, account status?		
3.6. Can displayed result fields be sorted, rearranged, added, or removed according to the user's preferences?		
3.7. Does the system display a message if no results are found?		
3.8. Does the system display the number of results found and the time taken to return the search results?		
3.9. Does the system have an adjustable limit for the maximum number of results returned?		
4. Property Owner Records	Yes/No	Cost to Modify
4.1. Does the application allow multiple owners per parcel/account?		
4.1.1 Does the application allow for the same Owner ID to be coded to different interest accounts within the same parent-child relationship?		
4.2. Does the system allow for additional lookup names to be entered in ownership records?		
4.3. Does the system allow for official documents to be entered out of chronological order?		
4.4. Does the system allow a user to undo a deed entry?		
4.5. Does the system allow a user to update one mailing address for multiple accounts?		
4.5.1. If so, can the user specify what accounts are updated?		
4.6. If so, are the interests and values maintained at the account level?		
4.7. Does the system support multiple addresses per taxpayer?		
4.8. If so, does the system allow the user to indicate which address is for mailing?		
4.9. Does the system support multiple phone numbers per taxpayer?		
4.10. Does the system support CASS Certification information?		
4.11. Does the system allow for document images to be scanned or attached to taxpayer records?		
4.11.1. Does the system allow for official documents to be entered out of chronological order?		
4.12. Does the system allow for the identification or flagging of International Addresses?		

4.13. Does the system provide the ability to flag returned mail?		
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16. Contact Information:

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