

AN ESRI CANADA PROPOSAL

June 10, 2024

Mass Appraisal System

Prepared for:

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June 10, 2024

Mr. Grady Ewing, Quality Assurance Manager
Tarrant Appraisal District
2500 Handley-Ederville Road
Fort Worth, Texas, 76118

RE: Esri Canada Response to Tarrant Appraisal District (TAD) RFP for a Mass Appraisal System

Dear Mr. Ewing:

Esri Canada would like to thank you for the opportunity to provide this proposal in response to the Tarrant Appraisal District RFP for a Mass Appraisal System. Our response is organized in the format stipulated in the RFP and represents our commitment to support TAD per the requirements, objectives and vision set out in that document.

Since its founding in 1984, Esri Canada has focused on the implementation and use of Geographic Information System (GIS) technology and GIS best practices through consulting, training, and project methodologies. We understand how best to leverage GIS as a transformational enterprise platform and create sustainable value, particularly for organizations providing land management, planning, valuation, mass appraisal and property assessment services. Our Esri ArcGIS platform interfaces easily with all areas of an organization's operations, providing innovative essential services and unique to Esri capabilities that ensure a fully "Connected" organization of users. Esri ArcGIS tools are used ubiquitously in government and commercial organizations across North America. Tarrant County already employs our enterprise technology and is a significant user long term valued customer of Esri (e.g. <https://gisit.tarrantcounty.com/publicmapviewer/>)

Over the last decade Esri Canada endeavoured to build new generation property assessment application solutions based on our leading ArcGIS technology. Our Assessment Analyst (AA) product suite uses the powerful functionality available from the Esri ArcGIS platform to provide advanced assessment data management and analysis, efficient workflows, and more precise, uniform, and equitable property valuations which comply with the International Association of Assessing Officers (IAAO) Standards for Mass Appraisal.

Esri Canada is very excited to offer to TAD a geospatially enabled COTS-First solution and innovative approach for your new Mass Appraisal System; the Assessment Analyst® GAMA (Geographic Assisted Mass Appraisal). Our AA GAMA - Evaluator product leverages an advanced Esri ArcGIS SaaS-based platform and powerful Esri ArcGIS-based capabilities with specialized property assessment/mass appraisal functions. It represents a new generation integrated capability that delivers on all your mass appraisal requirements objectives and protocols.

This proposal describes our turn-key Mass Appraisal System, how we meet the specific RFP objectives, our approach to deploying the solution, and the technical advantages, efficiencies and return on investment it can offer to TAD over more ad-hoc, improvised, disconnected, and customized technology options which are not delivered on a consistent, supported platform like that from Esri. The combination of our proven best-in-class technology, domain expertise, project management execution, training, technical support, and maintenance program will ensure that the solution is optimized for TAD's needs, reliable and future proofed.

To support the AA GAMA - Evaluator implementation, configuration and maintenance, we will use Esri Canada's Assessment Practice team members who focus solely on developing, implementing and supporting our property assessment solutions. This team has delivered projects worldwide and has developed unparalleled knowledge in applying our GIS specifically to solve assessment management business needs. Their expertise includes understanding the methods to efficiently optimize the integration and configuration of AA GAMA - Evaluator to meet all mass appraisal management workflow and functional requirements at TAD.

The AA GAMA - Evaluator environment has been designed by experts and tested by complex users to deliver mass appraisal protocols within new generation architecture, functions and workflows. We can add critical value beyond your current CAMA system, providing TAD with a comprehensive geo-enabled solution with improved property valuation and mass appraisal.

Thank you again for the opportunity to provide this proposal. If you have any questions, please feel free to contact [REDACTED]

Sincerely,

[REDACTED]

[REDACTED]

Esri Canada Limited

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1. Executive Summary

1.1 Introduction

Esri Canada Limited is pleased to submit this proposal to provide a new turn-key Mass Appraisal System for TAD. Esri technology enables location intelligence to increase efficiencies and solve problems by visualizing and analyzing data on a map. Our location intelligence solutions provide more intuitive analysis, unique insights, and power real-time understanding, transforming decision-making and supporting faster data sharing and more fluid collaboration. As the leading GIS worldwide, the ArcGIS platform represents an ideal base for developing geo-enabled property appraisal tools and processes. ArcGIS supports an organization's workflows and business requirements by providing a SaaS-based platform that supports authoring, serving, data management, editing, analysis, and visualization of information in geographic context which is critically important when administering land and property information.



The evolution of CAMA over the past 15 years has seen the Assessment Industry placing a greater reliance on GIS in property database administration. GIS adds tremendous value to CAMA systems. Esri Canada understood the enormous opportunity to be gained for assessment agencies by upgrading standard CAMA technology through smart geo-enablement. In 2012, Esri Canada invested in building an Assessment Practice Team specifically to support the development of innovative ArcGIS-based property appraisal, valuation and assessment solution tools for the market. Since that time, our team has been building and refining our Assessment Analyst (AA) product suite that offer excellence in assessment management:

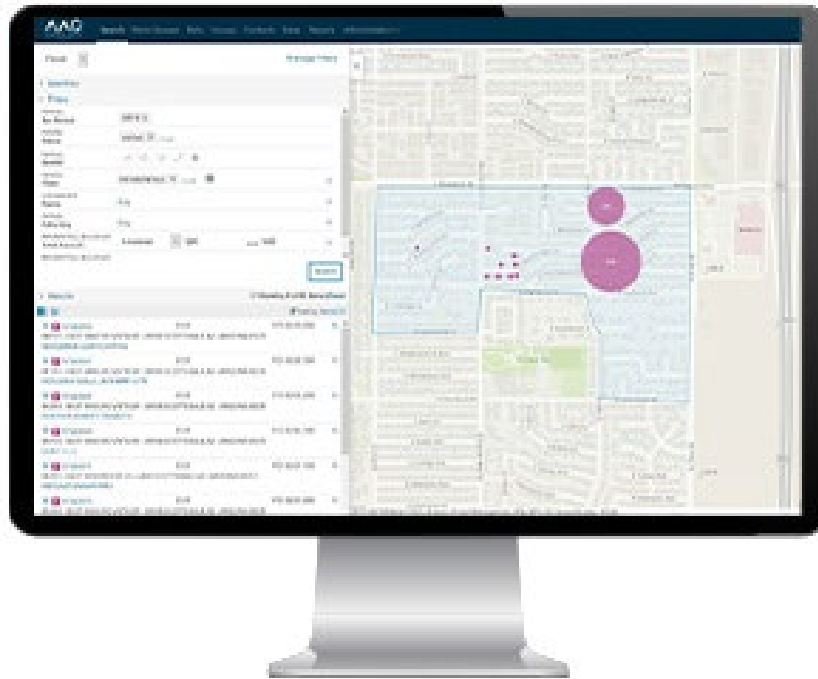
- **Assessment Analyst®** - [DTR](#)

- A desktop review solution that visualizes and corrects a vast array of missing physical data simultaneously using GIS as the integrator between data and imagery sets such as Streetfront, Oblique and Orthographic Imageries.
- **Assessment Analyst® - [3D](#)**
 - Leverages the power of Assessment Analyst while enabling 3D visualization and spatial analysis through the building of a Digital Twin in 3D space of requisite legal ownership records such as Condominiums and Strata units. This presents a physical and digital twin of a city and when combined with Assessment data presents both a physical, digital and economic twin down to the individual legal parcel level of a city.
- **Assessment Analyst® - [GeoSketch](#)**
 - A geospatial geometry editing environment within Assessment Analyst for sketching and editing buildings and other structures directly on a map.
- **Assessment Analyst® - [GAMA \(Geographic Assisted Mass Appraisal\)](#)**

By 2016, based on solicitation from customers, the desktop solution evolved into a more comprehensive product that delivered all modern assessment processes, standards and protocols, a *Geographic Assisted Mass Appraisal (GAMA) System*. Built on Esri's ArcGIS software platform, AA GAMA - Evaluator leverages the powerful functionality available from Esri technology to deliver more efficient workflows, advanced assessment data management and precise property valuations which comply with the International Association of Assessing Officers (IAAO) Standards for Mass Appraisal.

 - AA GAMA - Evaluator represents a new advanced capability for the assessment business; it dramatically improves the capabilities of CAMA by leveraging the power of geography which is the most significant contributory factor (location) in the valuation/appraisal of real estate.
 - AA GAMA - Evaluator incorporates all the end-to-end product functionalities of the Assessment Analyst suite into a consolidated Cloud based platform that delivers all the requisite capabilities for an Assessment jurisdiction to administer and produce assessment data, valuations, rolls and notices, including assessment appeal protocols. AA GAMA - Evaluator also allows for seamless integration with all ArcGIS Solutions products like Equitable Property Value, ArcGIS Dashboards, ArcGIS Hub, and Bulk and Single Property Editor that gives the ability to correct your data from the map and have it sync back to the AA GAMA - Evaluator solution.
 - The proven efficiencies and enhancements to assessment valuation accuracy, streamlined processes and tax revenues that our clients are experiencing speak for themselves. We enjoy significant growth in the adaptation of our AA GAMA - Evaluator solution. Consequently, Esri Canada is confident that we have demonstrated leadership in combining state-of-the-art valuation, GIS, analytics, modelling, and tools and are investing further to continue to make a substantial contribution to CAMA innovation and modernization. We are proposing that the TAD choose to benefit from the AA GAMA - Evaluator advantage.
 - AA GAMA - Evaluator provides a cloud-based, Geographic-Assisted Mass Appraisal service to property appraisal organizations. AA GAMA - Evaluator is a geo-spatially enabled web application built on Esri's ArcGIS platform. AA GAMA - Evaluator enables more efficient workflows and advanced

analytical capabilities to complement conventional Computer Assisted Mass Appraisal (CAMA) business applications and processes.



1.2 Understanding the TAD Mass Appraisal Requirements

Esri Canada has reviewed the background, goals and requirements presented in the RFP for this project. We understand TAD seeks to acquire and implement a new fully integrated CAMA system that includes all hardware, and software, with ongoing maintenance and support for automated mass appraisal administration in accordance with Texas State Law, Texas Property Tax Code, State Comptroller's Office Property Tax Division and USPAP (Uniform Standards of Professional Appraisal Practice). The new system will also include document archival hardware and software, document imaging software, and full integration with the current Geographic Information System (GIS).

The overall objectives of the modernized Mass Appraisal System are to expand TAD capabilities, increase data security, take full advantage of the latest advances in computing and information processing technology, enhance communications and improve the effectiveness of the entire organization and better serve the community. Key goals are:

- Maximizing the efficiency of the staff
- Automated tools
- Increasing appraisal accuracy, uniformity, and analysis capabilities.
- Fully integrating with GIS technology
- Providing the utilities and flexibility to accommodate the changes that are inherent with an appraisal district
- Providing the avenue for continued excellent service to our taxpayers and taxing units in the most cost-efficient manner
- Ability to integrate with new technologies
- Cloud Hosted / Offsite

- Disaster Recovery
- Automatically scaling processing
- Strong online presence
- Remain current on legislative changes and updates
- Parallel operation with existing system until all functions and features are proven
- Satisfying the proposed milestones

The new Mass Appraisal System at TAD must satisfy the following requirements:

- Be responsive to the functional needs of departments.
- Be sufficiently flexible in both functional and technical designs to easily accommodate future changes as required by Texas State Legislature, changes in technology as well as business environment and other industry vendors.
- Operate efficiently to meet the performance demands of all users internally and externally to TAD.

In delivering these requirements, the Mass Appraisal System must incorporate advances in computing and communications technology, such as:

- Current technology for application development
- Distributed and on-line data entry
- Structured systems design (fully normalized)
- Tools to create ad-hoc reports
- Capability to integrate with Scanning, Imaging, GIS databases, handheld Appraisal applications, and any future Relational Data Base Management System (RDBMS) compliant products
- Capability to FTP (File Transfer Protocol), import and export data accurately.
- Provide multiple database backups to ensure no data loss.
- Provisions for security control ensuring blocking of non-certified access.
- Provisions for disaster recovery and backups as well as checkpoints, should the application fail, ensuring no loss of data.
- Provide internal checks to ensure no loss of accounts or unintentional data changes.
- Capability to support online applications:
 - Appeals process
 - Informal value negotiation
 - ARB meetings
 - Electronic communication
 - Electronic Appraisal Notices
 - Application filing
 - API's
 - Microsoft 365
 - One Drive

Esri Canada is proposing to TAD a new generation, innovative Mass Appraisal System solution based on Assessment Analyst GAMA and its underlying world-leading GIS engine, Esri ArcGIS. **Our proposed solution will meet and exceed all the project objectives, goals and requirements above, as explained in the proposal sections below.**

1.3 AA GAMA – Evaluator Technology Advantages for TAD

- Esri Canada is a leading Esri technology distributor and solution provider in the Esri worldwide network. We have delivered thousands of successful projects involving ArcGIS application systems integrations with multi-stakeholder organizations. Esri Canada will draw upon decades of hands-on experience as an ArcGIS technology provider to all levels of government including over 75% of the cities and municipalities in Canada, and all commercial sectors such as 75% of the utility companies, telecoms, and engineering firms.
- The AA GAMA - Evaluator solution we would deploy at TAD represents the proven state of the art mass appraisal technology on the market. It is a cloud based SAAS solution with all functions and features streamlined in fully integrated environment. It is designed for flexibility and ease of maintenance which effectively handle changes in TAD business rules. All aspects of the functions, user interface designs and practical workflow options are user-friendly. Documentation is easy to use including on-line help features. The AA GAMA - Evaluator user can leverage advanced data management capabilities; it gives ready access to all necessary information, in a good response time, and provides easy importing and exporting of any and all data. The AA GAMA - Evaluator is cost effective to operate and maintain.
- AA GAMA - Evaluator leverages the powerful functionality available from Esri technology to deliver more efficient workflows, advanced assessment data management and precise property valuations which comply with the International Association of Assessing Officers (IAAO) Standards for Mass Appraisal. Our AA GAM-based solution will also be configured to support mass appraisal functions according to Texas State Law, Texas Property Tax Code, Texas Property Tax Assistance Division rules and USPAP Standards.
- The AA GAMA - Evaluator based Mass Appraisal System will be a complete solution including all hardware and application software licenses, installation, conversion of TAD databases and best practices training of TAD staff.
- AA GAMA - Evaluator is designed to automate the entire range of business functions and provide your staff with the capability for management of all appraisal processes, including requirements for query tools, form processing, report generating capabilities, and deliver an online presence which meets required legislative mandates.
- AA GAMA - Evaluator is a highly secure solution. It leverages the Microsoft Azure Cloud Services environment to provide infrastructure, network, storage, and redundancy. Microsoft Azure aligns with industry standards such as FedRAMP Moderate, ISO 27001 and SSAE16 SOC1 Type 2. AA GAMA - Evaluator leverages Microsoft SQL Server Transparent Data Encryption (TDE) in an Azure SQL database for encryption of all data at rest. All transfers of data and configuration settings between client and server are performed over an encrypted network channel.
 - Transmission protocol encryption is facilitated by the Microsoft ASP.NET Core (server-side) framework executing in an Azure App Service container for a cloud-hosted solution.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- The AA GAMA - Evaluator SaaS solution is hosted on the Microsoft Azure environment and therefore maintains all the cloud service assessment and application security testing criteria inherent in that cloud-based service. [REDACTED]
[REDACTED]
[REDACTED]
- In the RFP, TAD emphasized the need for integration with GIS for the Mass Appraisal System; AA GAMA - Evaluator is built using the Esri ArcGIS platform. Tarrant County is already a significant user of our Esri ArcGIS, which represents organizational compatibility and existing internal experience and infrastructure which we can leverage to implement the new Mass Appraisal System.
- As a COTS solution, the standard functionalities within the AA GAMA - Evaluator solution and the underlying ArcGIS engine will be architected and configured to align with TAD's requirements as it relates to parcel maintenance, parcel valuation, property categorization separated from real and personal property rolls, business valuations, tracking of the appeals process along with workflow steps and ownership update management. This security and flexibility will serve TAD's current and emerging needs and accommodate future advances in technology and growth completely and efficiently.
- Due to the native built-in technical competencies of ArcGIS, the AA GAMA - Evaluator has highly advanced integration capabilities for all third-party products, components, and modules. Such integrations will be designed to share information and thus reduce duplicative data entry and storing of redundant information. The information stored will be normalized using the Rules of Data Normalization.
- AA GAMA - Evaluator is built by Assessors, for Assessors and tested by complex users to deliver CAMA protocols within new generation, highly efficient workflows. AA GAMA - Evaluator can be integrated with other Esri solutions within the Tarrant County business to eliminate redundancies, duplication of effort, and maintaining authoritative data sources. TAD's users can be connected by using location and its modern web GIS foundation as the integrator, linking data together and producing a virtual location-intelligent information management and analytics engine that delivers smarter data-driven decisions and new insights. The benefits of the new AA GAMA - Evaluator solution at TAD will be increased productivity, accuracy and efficiency of property assessments supporting improved customer service.
- A key advantage we can offer to TAD is proven hands-on experience and leading expertise in implementing secure leading edge GIS applications specifically for the assessment sector. Our growing Assessment Analyst customer base is both domestic and international, with much of the growth occurring in the U.S local government sector. This experience and expertise will ensure that we can effectively deliver our innovative AA GAMA - Evaluator solution for TAD, efficiently leveraging, as warrants, the current ArcGIS environment.
- Relevant projects that highlight our Assessment Division expertise in CAMA and AA GAMA - Evaluator are included in the reference section (Section 6) of this proposal. A primary example would be the business relationship we established with Maricopa County, AZ, beginning in 2012 by delivering our AA Desktop Review application. Maricopa County has approximately 1,700,000 parcels and 7 years of historical data which

has been converted over to our solution. This work was so successful and effective for the County, providing substantial Return on Investment (ROI), that in 2016, they contracted Esri Canada to build an AA GAMA - Evaluator solution as a permanent replacement to their traditional CAMA system. Our successful work at Maricopa would be a model for the Mass Appraisal System at TAD.

- AA GAMA - Evaluator originates from innovation. It leverages the power of GIS and advantages of location intelligence to manage the specific requirements of property assessment organizations. The COTS based, configuration first approach means that the AA GAMA - Evaluator solution will fit your needs rather than TAD having to modify its existing, honed organizational processes and workflows. AA GAMA - Evaluator capabilities and flexibility will offer to TAD some key options for enhanced overall operations and efficiency.
- AA GAMA – Evaluator is a COTS SaaS Subscription based application and as such, all future enhancements to the product are released to all customers during the life of their subscription. A good example of this is the current work that the team is doing around Artificial Intelligence. When features are built (outside of the contract requirements) such as the use of AI in valuation models, those features are available in applicable Product Releases and available to all clients at that time.

1.4 Implementation Quality Assurance Strategy

Our systematic approach to implementing a new AA GAMA - Evaluator solution uses industry best practices which include working closely with the customer to deliver the solution that best meets their business requirements. Esri Canada will propose a low-risk approach to conducting business analysis, implementing, and configuring/customizing and migrating data for our AA GAMA - Evaluator application that has been used successfully for other AA GAMA - Evaluator customers. Further and most importantly, we have never missed a release date for our customers based on use of this approach which again begins upfront with a rich and in-depth Business Analysis review to ensure all stakeholders are aware of the requirements, best approaches, and modern technological solutions. The key part of this strategy is the use of multiple releases combined with the agile development approach and the determination of scope and importance of using the MoSCoW business analysis triaging methodology (M=Must have, S=Should have, C=Could have, W=Will not have).

Esri Canada follows an Agile software development methodology with Waterfall (deadline-driven) releases, to maximize value and effort in delivering AA GAMA - Evaluator. Daily development team scrum meetings are conducted to ensure developers are on track to deliver assigned Tasks, Bugs and User Stories for the Sprint. Scrum meetings provide a platform for developers to highlight successes, challenges, and risks with the team, so they can provide support, as necessary. Development Estimation Sessions occur weekly and during Scrum meetings in which the Esri Canada Business Analysis and Product Development teams review any potential changes in requirements to confirm that development estimates are as complete and accurate as possible.

Esri Canada maintains a robust and mature developer operations (DevOps) environment that leverages the best-of-breed enterprise technology from Microsoft in the form of Visual Studio Team Services (VSTS) and Team Foundation Version Control (TFVC). [REDACTED]

[REDACTED]

As part of the Project Management methods, Esri Canada has developed a solid infrastructure for quality assurance in support of all its professional services. The Esri Canada Team’s approach features a comprehensive set of strategies and tools that promote a low incidence of defects in client deliverables as they pass through the various testing stages. To optimize its quality assurance process, Esri Canada implements Quality and Assurance (QA) services on a project-specific basis. The focus is on identifying critical modelling and implementation steps by closely scrutinizing all aspects of each project phase as they apply to a specific project. Developing project-specific QA procedures ensures that all aspects of the project are directed toward fulfillment of the client’s specific needs.

This approach recognizes that early delivery of functional software helps to provide a basis for rapid evaluation and feedback. In this way both Esri Canada and TAD can ensure that the development focus is consistently applied to the top priorities, and that the results are aligned with expectations throughout the implementation period.

Esri Canada delivers implementation services which prepare for the smooth transfer of the new solution for each phase release to ensure a seamless, low-risk migration of resources (knowledge, tools, and processes) with minimal disruption

1.5 Esri Canada Assessment Resource Strategy

Our meticulously crafted resource plan reflects our unwavering commitment to delivering exceptional results and showcases our deep understanding of the project's intricacies. With a clear focus on both implementation and ongoing support, we have taken every measure to ensure a seamless and successful journey from inception to maintenance.

Esri Canada’s Assessment Practice Team will provide turn-key services including planning, installation, configuration, integration, data conversion, testing, training, and on-going maintenance of the new Mass Appraisal System. We do not use subcontractors.

Our Resource Plan involves a carefully balanced allocation of skilled professionals across various critical roles. Each resource has been thoughtfully selected for their expertise, experience, and compatibility with the project's unique demands. By deploying a diverse team with complementary skill sets, we are primed to address challenges from multiple angles and ensure a robust foundation for success.

Our team of seasoned professionals, including a dedicated Project Manager, Software Architects, Senior Developers, Application Specialists, Business Analysts, Data Migration Specialists, and Quality Assurance Specialists will drive the project's implementation phase. Our highly experienced project manager will be assigned as a single point of contact for TAD throughout the entire life cycle of the project. Their combined expertise guarantees a holistic approach to development, design, and quality control, enabling us to bring the project to fruition with precision.

TAD will also be leveraging Esri Canada's Subject Matter Expert's (SME's) of former assessors with over 50 years of domain expertise, whose core focus is solely on implementing AA GAMA - Evaluator solutions. This team has successfully delivered projects worldwide utilizing their unparalleled knowledge in the application of GIS specifically, to solve assessment/appraisal management business needs. In addition, have developed, hands-on, the specialized tools and methods to optimize the configuration of the AA GAMA - Evaluator solution to deliver all required appraisal management workflows and functions for organizations.

In conclusion, our resource plan is a comprehensive roadmap that instills confidence in our ability to meet the project's objectives. By strategically allocating resources, maintaining adaptability, and drawing upon our extensive experience, we are resolute in our commitment to delivering exceptional results at every stage of the project's lifecycle.

2. Vendor Information

1. **Description of the company**
2. **Parent or subsidiary status**
3. **Description of all business activities engaged in by Vendor**
4. **Number of employees**
5. **Complete list of customers in Texas currently utilizing the product proposed**

2.1 Description of the Company

Mapping the way to a sustainable future

Everything is somewhere. To solve our most complex problems, we believe in understanding them in the crucial context of location. Founded in 1984, [Esri Canada](#) is a privately held company that delivers enterprise geospatial solutions based on [ArcGIS](#), the world's leading Geographic Information System (GIS) software. Esri Canada is the independent, exclusive distributor of Esri technology in Canada. Our solutions empower organizations to make informed and timely decisions by leveraging the power of mapping and spatial analytics - [The Science of Where](#). GIS has now become an important technology in every field, improving efficiency, management, communication, and decision making. Esri is the world's leading provider of GIS; our users have made GIS come alive in countless applications across hundreds of thousands of organizations.

Employees/Customers

Headquartered in Toronto, we serve over 14,000 organizations across industries. Our highly coordinated team of more than 600 employees provides local support from 15 offices and remotely across North America.

We currently have not delivered Assessment Analyst to any organizations in the State of Texas; however, our expanding customer base already covers assessment organizations across the U.S including in FL, KY, NC AZ, HI, NM, SC, IA, WI.

Connecting customers with our global community

Our customers are part of the largest GIS technology user community in the world: over one million users in 300,000+ organizations worldwide rely on Esri technology to design a better future. They also gain access to value-added solutions offered by more than 2,000 partners in the global Esri Partner Network.

Recognized industry and business leader

According to a 2019 market study by ARC Advisory Group, Esri accounts for over 45% of the worldwide GIS market by revenue, which is several times greater than its competitors.



In the report [The Forrester New Wave™: Climate Risk Analytics, Q4 2022](#) that evaluated 10 vendors, Esri received a differentiated rating—the highest score possible—in nine out of 10 criteria, including “Advanced Data Processing,” “Visualization” and “Threat Modelling”. The report notes “Esri is the best fit for companies that need strong analytics data and rich visualization... If you have physical assets that could be threatened by climate, Esri can bring the data and processes to bear to target operational resiliency opportunities.”



Platinum member

Esri Canada joined the elite rank of Canada’s Best Managed Companies in 2012 and achieved Platinum Club status, the highest level of the program, in 2019, by retaining our Best Managed designation for seven consecutive years or more. Our company was selected over hundreds of Canadian private companies that applied to this national award program by Deloitte for our exceptional strategy, capability, commitment, and financial performance.



Esri Canada has consistently placed in the top 20 of Canada’s Top 100 Solution Providers, an annual ranking by revenue produced by Channel Daily News (CDN) and verified by IDC Canada. Esri Canada has also earned several CDN Channel Innovation Awards, which recognize companies that develop breakthrough solutions, seek niche opportunities, and break new ground in serving partners and customers.



Esri Canada is ISO 27001:2013 certified. ISO 27001 is one of the most rigorous security and compliance standards for information security management systems recognized globally. With this certification, you can be assured that our company’s information security practices meet the highest industry standard, demonstrating our commitment to customer data protection, confidentiality, and integrity. [View the certificate.](#)

Unparalleled expertise

Applying GIS technology requires careful consideration and planning. To help our customers get the most value from their investment, Esri Canada provides superior consulting services. Our consultants, located in each of our 15 offices and remotely, have the skills to assist organizations in navigating through the process of successfully implementing a geographic founded solution.

Our corporate Professional Services team includes more than 260 GIS experts, information technology and application specialists, and resource and domain professionals. This team has implemented thousands of GIS solutions across Canada, the U.S and internationally and has established an excellent track record of delivering projects on time and on or under budget. Esri Canada has unparalleled experience and proven expertise in providing planning, management, design, configuration and implementation services for customized web and enterprise solutions.

Esri Canada is unique among GIS firms in that we do more than provide professional services in support of our customers. As a leading Esri distributor, we have the complete view of the customer in mind when we engage. Our mission is to enable organizations to find ongoing success with their investment in Esri GIS, whether that is through expert consulting, effective account management, targeted training, timely technical support, or customer care. This 360-degree approach ensures that our consulting personnel have a complete view of our customers now and where they can evolve with adoption of Esri GIS. Esri Canada will bring to bear the full support of our comprehensive GIS consultant skillset to leverage this approach and ensure a successful project. This intrinsic value and support are available at no extra cost to the project and serves to effectively meet the planned project objectives and schedule.

Proven methodology

Based on industry-leading best practices and drawing on our extensive customer engagement experience, we employ a proven methodology that covers all phases of the GIS project life cycle. This approach takes full advantage of the resources within our organization, mitigating risk for our customers and ensuring overall project success.



A broad array of services

Esri Canada provides professional services in the following fields:



Tarrant Appraisal District

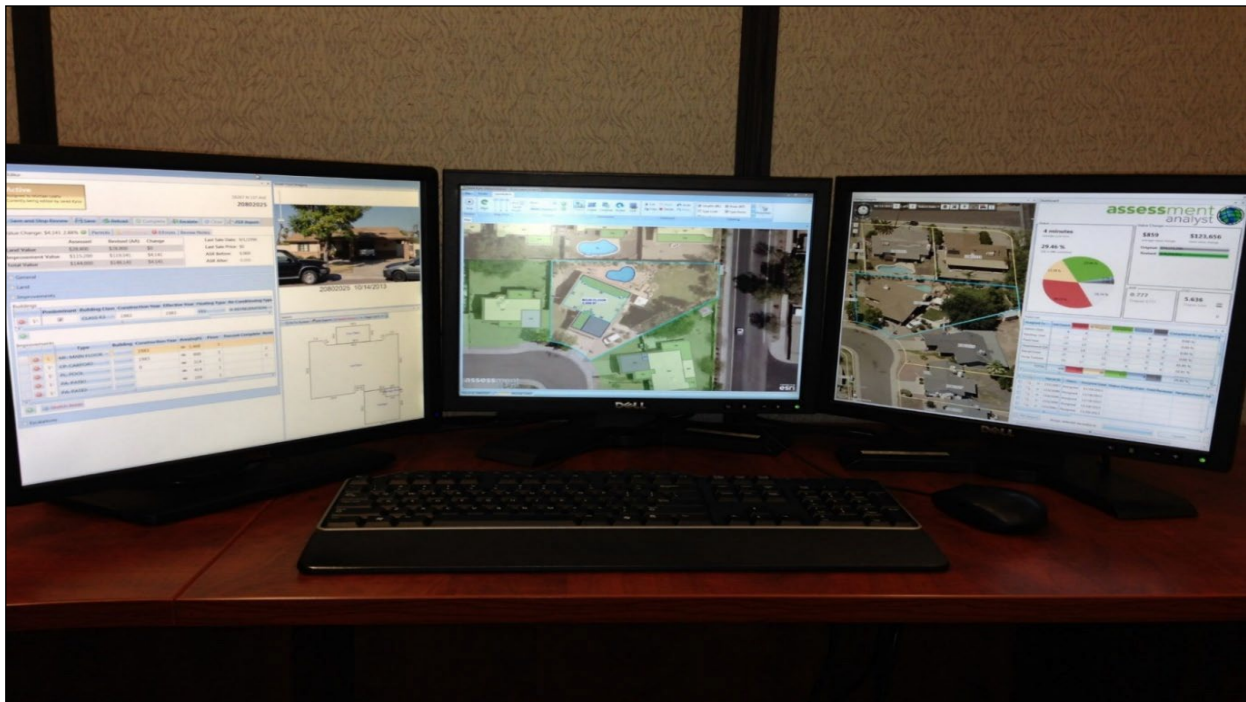
- Enterprise strategic planning, IT architecture and implementation
- Development of custom GIS desktop, web-enabled or enterprise applications
- Web data portals
- Project management, business case development, feasibility studies and needs analysis
- Business analysis and conceptual implementation
- System architecture and engineering
- Enterprise system and data migration
- Spatial database specification and design
- Systems configuration, integration, testing and implementation
- Asset management and permitting management solutions
- Interface design
- Comprehensive technical training programs and technical support

2.2 Property Assessment Specialization

Esri's ArcGIS is the leading spatial software to land title, land records, assessment, and cadastral agencies worldwide. Esri ArcGIS software assists agencies to meet their primary responsibilities of ownership registration, parcel mapping, real property assessment and valuation, and data access and offers Web-based tools to provide access to this data to the public, businesses, and other organizations. ArcGIS also supports the creation and maintenance of a more accurate land records basemap using the advanced tools and functions of GIS and provides a single repository of parcel geometry and descriptive data supporting workflow, updates, mass appraisal and titles input.

The Esri ArcGIS platform can apply advanced location visualization and analytics across the entire organization and with stakeholders. The platform approach relies on the leading, state-of-the-art COTS enterprise capabilities which allows easy implementation. The platform includes ready access to a wide range of ready-to-use apps, maps, and data. The ArcGIS platform advantages can be applied to provide a state-of-the-art foundation for a solution that integrates data, technology, processes, and operations, across groups, to effectively respond to the volume of property assessment/appraisal data as well as to the need to modernize assessment workflows, data access and analysis. These advantages are why Esri is the GIS system of record at Broward County.

In 2012, Esri Canada invested in developing an Assessment Practice specifically to support innovative property valuation and assessment solutions for appraisal/assessment organizations. The Assessment Practice team initially configured ArcGIS platform functions and tools to provide an Assessment Analyst Desktop Review (AA DTR) capability that enhanced traditional CAMA capabilities. AA DTR is a cloud-based desktop review solution that visualizes and corrects a vast array of data simultaneously.



AA DTR (now AA GAMA – Editor) User Interfaces

Coincident with the development of AA DTR, and in response to the evolving market, the Esri Canada Assessment practice developed a suite of other Assessment Analyst products that offer excellence in assessment management including Assessment Analyst 3D (3D visualization and spatial analysis), Assessment Analyst Mobile (A digital data collection and review workflow that connects the field and office) and Assessment Analyst GeoSketch (A geospatial geometry editing environment within Assessment Analyst for sketching and editing buildings and other structures directly on a map).

By 2016, based on solicitation from customers, AA DTR evolved into a comprehensive product that delivered all modern assessment processes, standards, and protocols, a *Geographic Assisted Mass Appraisal (GAMA) System*. Built on our ArcGIS software platform, the [Assessment Analyst GAMA \(AA GAMA - Evaluator\) application](#) leverages the powerful functionality available from Esri technology to deliver more efficient workflows, advanced assessment data management and precise property valuations.

AA GAMA - Evaluator offers the most tightly integrated assessment data environment on the market. With AA GAMA - Evaluator you can visualize and correct a vast array of data simultaneously and efficiently which improves the quality of your data for consistently accurate assessments and mass appraisals. It also automates many aspects of your workflow, so that you can save time by making calculations, running valuation models, and reassessing properties on the fly.

Inaccurate data leads to imprecise and inequitable valuations. Enhanced visualization and robust functionality will allow you to not only detect data changes or errors more easily, but also, correct and resolve them all from a single system. AA GAMA - Evaluator allows you to manage your projects through an intuitive dashboard to complete your work more efficiently while monitoring productivity all while having the conventional capabilities of a traditional CAMA such as Ownership Administration, Sale/Deed Processing, Property Data, Valuation Approaches, and Reporting Capability, for example.

AA GAMA - Evaluator is built on a platform of configurability and designed from the bottom up with the best practices in Valuation Functionalities & Best Practices, User Interface, and Design in mind. AA GAMA - Evaluator was built by Appraisers for Appraisers so each aspect of the system is designed to be user friendly and intuitive meaning users from each business group will, with some training, be able to navigate and operate the software with ease. Administration of the system is also based on configurable principles of development and allows system administrators to perform most tasks efficiently through the front end, without the need for access to underlying data models and tables.

Esri Canada's Assessment Analyst approach relies primarily on implementing out of the box, turn-key SaaS-based capabilities which leverage advanced ArcGIS and assessment functions already built in our platform and applications. Using the ArcGIS environment, we deliver a systematic and practical scope of proven implementation work which ensures a low-risk and orderly transition from a current legacy state to the new Assessment Analyst environment. In the case of this project, we will focus on implementing and integrating a powerful mass appraisal solution for TAD.

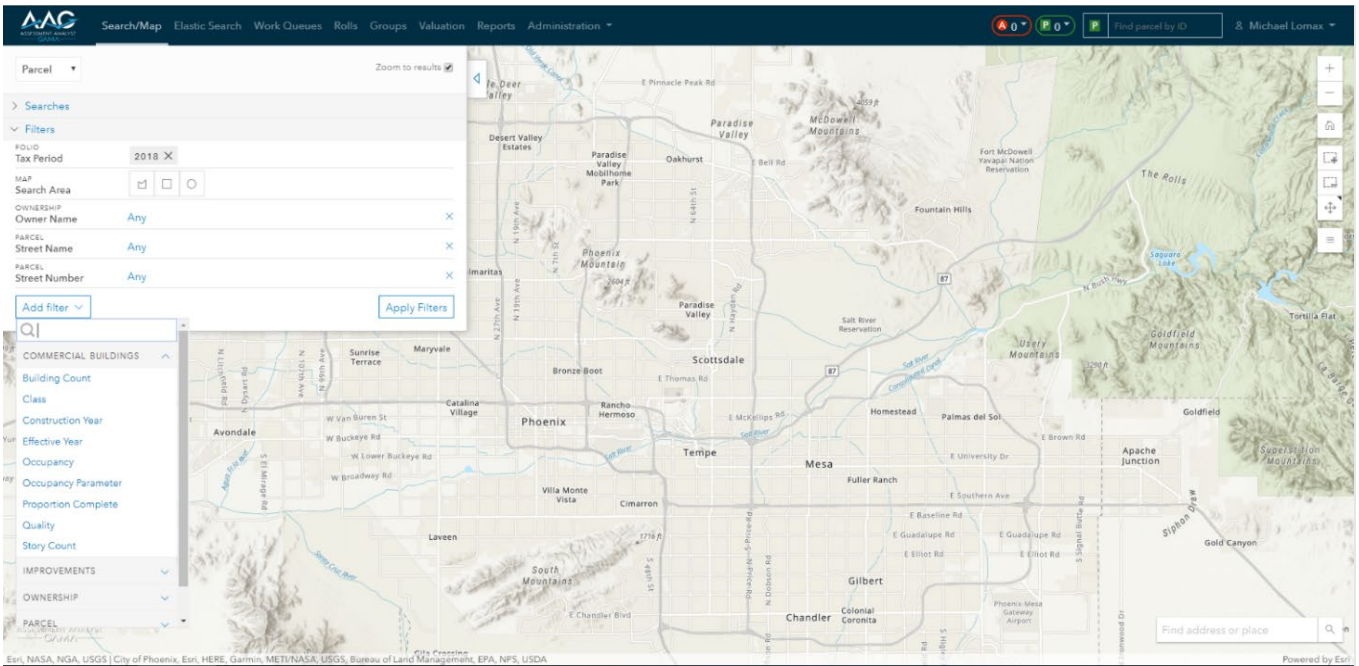
Features of Assessment Analyst – GAMA



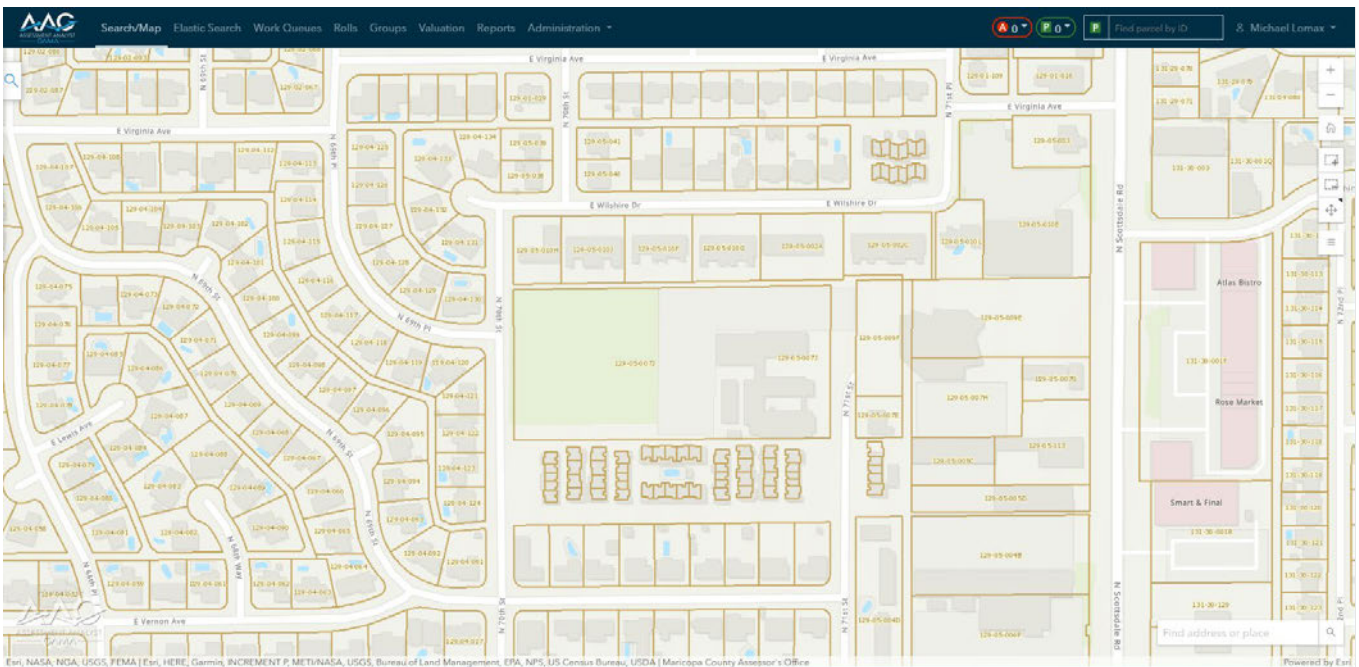
The AA GAMA - Evaluator solution offers new methods and standards that deliver the following:

- More accurate and predictable base results.
- Improved data quality and integrity, with more consistent data collection and accurate property data.
- Reduced re-inspection cycles, at least to industry standard of every 6 years.
- Greater fairness of taxation.
- Enhanced public trust.

Select examples of AA GAMA - Evaluator functions are illustrated in the screenshots below.



Launch Map 1 - Screenshot from AA GAMA - Evaluator



Launch Map 2 - Screenshot from AA GAMA - Evaluator





2.3 Advantages Summary

A summary of the key benefits and unique value of using Esri Canada's experience, innovative GIS-based approach and the AA GAMA - Evaluator solution at TAD are as follows:

Corporate Stability

- 40 years of delivering ArcGIS-based solutions.
- 12 years of developing and delivering innovative Assessment Analyst assessment/appraisal solutions.
- A privately held company with zero debt, we are focused on what is most important - our customers.
- Proven track record in the delivery of large, business-transforming GIS and Assessment Analyst projects and of delivering those projects on time and on/under budget.
- Responsible business committed to sustainability.

Expertise

- Your project is in good hands. We have a wealth of specific Property Assessment Domain Expertise with 3 previous Deputy Assessors from one of the largest Assessment Jurisdictions in the world – British Columbia Assessment Authority.
- We are acknowledged experts in optimizing the planning, management, implementation, integration, and maintenance of ArcGIS-based solutions.
- We use a proven service delivery methodology that increases success rates and reduces risk for customers. Our professional services enable our customers to quickly roll out their solution to production and guide them to successfully transition into sustainment and technical support.

Leading Technology

- Our business is to leverage the very latest Esri ArcGIS Commercial Off-the-Shelf (COTS) technologies. The underlying ArcGIS software is a long-term, proven foundation. It has been deployed to countless customer production environments. It delivers the necessary core functionality in a stable and problem-free package. Esri Canada's approach to solution development ensures rigorous testing of all new functionality and enhancements to ensure efficiency and stability.
- Our technology is implemented and operating within highly secure IT environments. The AA GAMA - Evaluator represents state-of-the-art in employing security protocols.
- We routinely employ a standard, systematic methodology to implement an AA GAMA - Evaluator solution that has been proven for other similar projects. At a high level, the methodology utilizes an Agile Development framework within a defined development period while leveraging Cloud Architecture to ensure timely and responsive releases.
- Our Assessment Practice team delivers proven state of the art assessment application capabilities. Assessment Analyst products are purpose built as a solution to managing all modern property assessment approaches, configurable workflows, reports, regression, cost tables, lookups, valuation, and sales reports.
- Assessment Analyst products offer operational efficiencies, scalability and flexibility and robust design that allows customers to continue to evolve with the industry and adjust their work environment without relying on the vendor to make custom code changes or manually run reports.
- Configure and extend COTS; avoid developing custom components whenever possible.
- Our customers are not "version-locked" by custom applications unable to take advantages of COTS advances; AA GAMA - Evaluator evolves and advances as the COTS software evolves, resulting in continual improvements.
- Keep user and Esri improvements and enhancements to software trackable by version, this ensures history and sustainability even if critical or important people no longer participate on the implementation team.
- AA GAMA - Evaluator is very user friendly and requires less specialized knowledge to maintain or improve.
- Esri Canada capabilities ensure that customers can rely on effective knowledge transfer during implementation and proven, comprehensive longer-term training options.
- Ongoing, well-established technical support with predictable and manageable costs. Customers can rely on effective technical support when a problem arises. Supported through the longstanding Esri software support program and/or targeted applications services agreement and upgradable through regular software updates unlike traditional custom implementation offered by other vendors.

Esri ArcGIS Future-proofed

- With Assessment Analyst, you are buying tomorrow's technology: we leverage the world's leading, supported GIS that functions and integrates through known, documented, and accepted IT, Web, OGC, Open Source and de-facto Standards. Esri reinvests about 30% of annual revenues into product R&D to ensure innovation and maintain that lead. This gives customers the comfort of knowing they have invested in a new generation assessment product having no chance of obsolescence in the coming years.

Depth of Resources

- Empower your organization with best practices from trusted experts.
- Position your project for success with the help of our highly coordinated team. We have the depth of resources to see your project through. Our project managers, senior consultants, application specialists, industry and technology leads are supported by technical specialists from other teams within Esri Canada and key partners.
- Esri Canada Professional Services teams exist to support successful customer deployments of ArcGIS. Successful projects produce successful customers that successfully transition into sustainment and technical support.
- Experts in delivery of Agile implementation methodology with Waterfall (deadline-driven) releases, to maximize communications, value and effort on the project.
- Project Management Office (PMO) and executive oversight built into all high value/high-profile projects.
- Esri Canada is not designed to be a 'body shop', we want to enable self-sufficiency where customers are comfortable to run and grow their own systems.

2.4 Parent or Subsidiary Status

Esri Canada is a privately held independent company. For 40 years, we have been the exclusive distributor in Canada of technology from Esri Inc., the world-wide ArcGIS product provider. We are experts in delivering enterprise geospatial solutions based on ArcGIS, the world's leading Geographic Information System (GIS) software.

3. Vendor Business Philosophy

1. **Mission Statement**
2. **Short Term Goal List**
3. **Long Term Goal List**
4. **Support Perspective**
5. **Customization Perspective**
6. **Software Enhancement Plan**
7. **Staffing Perspective**
8. **Legislative Changes Plan**

1. Mission Statement

Esri Canada's mission is to apply a geographic approach to problem-solving, brought to life by modern, enterprise-grade GIS technology. We are committed to using science and technology to build a sustainable world.

From our GIS solutions to our corporate programs and corporate social responsibility initiatives, we build community and promote sustainable prosperity – ensuring that we meet present needs without compromising future generations' ability to meet their own needs. We initiate and participate in programs that positively impact our economy, society and

the environment. We assist communities through corporate giving initiatives, support youth through the Esri Canada GIS Scholarship Program and build strategic environmental partnerships.

Caring for the Environment

- Our green roof at the Toronto office is a popular site for urban environmental studies. It has also become a model for researchers working to advocate green roof bylaws in their own municipalities.
- We participate in the Fatal Light Awareness Program (FLAP) dedicated to safeguarding migratory birds in urban areas. We developed the Global Bird Collision Mapper, a web app that is helping to build the first global database of bird-building collisions.
- We continue to support environmental organizations including [Ducks Unlimited](#) and the World Wildlife Fund.

Environmental Conservation

Esri Canada is a member of Chapter 150, a group of visionary business leaders helping to connect the longest recreational trail in the world – the Great Trail – and all Canadians. We donated technology and services to map the 24,000 km-long trail that was known as Trans Canada Trail in time for Canada’s 150th anniversary. We also built The Great Trail: Explore the Trail app, which allows the public to view the Trail online.

We donated software and services to revamp the mapping of Vélo Québec’s Route verte (Green Route), the longest bicycle route in America, exceeding 5,300 kilometres. Now, the public can access online valuable real-time information, such as closures and construction on the route, and even calculate the elevation for the most efficient bike routes.

Building Stronger Communities

Through the committed efforts of our employees, Esri Canada initiates and supports an array of broad-reaching community projects that touch people in many different ways.

Fostering Innovation

To foster innovation in communities, we developed the Community Map of Canada. Updated daily, it represents over 500 municipalities, provincial, territorial and federal agencies and is the first detailed, national web basemap available to the public at no cost. People can use this basemap to develop GIS apps based on authoritative, free and timely data.

Strengthening Indigenous Communities

We collaborate with Indigenous communities for resource management and environmental stewardship. Integrating traditional knowledge with GIS ensures sustainable land management and informed decisions for present and future generations.

Enabling Smart Cities

We know how quickly the urban landscape is changing so to keep our cities smart and livable, we have donated training and software to the Canadian Urban Institute, a non-profit that supports efforts to keep our cities resilient, livable and responsive to residents.

Enabling Safer Communities

We created an enterprise solution that includes a public web app, MCSC rescu, for the Missing Children Society of Canada (MCSC), a Calgary-based non-profit organization that works with police across Canada in the search for missing children. The app sends missing children alerts to people whose engagement will help police locate a missing child.

2. Short Term Goal List

- Continue to focus on what is most important - our customers.
- Based on the world's most powerful GIS software, ArcGIS, we continue to ensure that our solutions enable organizations to better manage their resources, plan their future and collaborate within and beyond their organization to achieve sustainability.
- Continue to foster excellence in planning and delivery of business-transforming GIS and Assessment Analyst projects and of delivering those projects on time and on/under budget.
- We use best practices to work hands-on with our customers; using an innovative geographic approach to problem-solving and facilitating connections - employing location as the key to integrating and organizing all relevant information.

3. Long Term Goal List

- We have been delivering world leading ArcGIS solutions for 40 years. We will continue to support our customers building innovative, secure GIS solutions that enable them to better manage their resources, plan their future and collaborate within and beyond their organization.
- Commitment to responding to the evolving needs of our Appraisal customers by continuously enhancing the capabilities and functions in AA GAMA. – Evaluator.
- With Esri technology, you are buying tomorrow's technology. AA GAMA - Evaluator leverages the world's leading, supported GIS that functions and integrates through known, documented, and accepted IT, Web, OGC, Open Source and de-facto standards. Esri reinvests about 30% of annual revenues into product R&D to ensure innovation and maintain that lead. This gives customers the comfort of knowing they have invested in a new generation assessment system having no chance of obsolescence in the coming years.
- The operational efficiencies, scalability and flexibility and robust design of AA GAMA - Evaluator allows customers to continue to evolve with the industry and adjust their work environment without relying on the vendor to make custom code changes or manually run reports.
- Esri Canada maintains one software product suite to meet the requirements of numerous users. Individual components in the suite are continually maintained and enhanced subject to a roadmap that is guided by priorities from the user community at large. Enhancements that are applicable to a specific customer environment are designed with configurability from the start. In this way, features may be enabled and disabled for individual customers through configuration with no product customization whatsoever. Similarly, if an enhancement has been developed for a specific customer it may be made available to other customers if and when desired.

4. Support Perspective

A key competitive advantage that Esri Canada offers is superior project planning, management, training, and technical support methodologies. Our approach uses industry best practices which include working closely with the customer to deliver the solution that best meets their business requirements. Esri Canada prides itself on providing application and technical support with a very high customer satisfaction rating.

As a leading Esri distributor since 1984, we have established a complete view of the customer when we engage. Our mission is to enable organizations to find ongoing success with their investment in our technology, whether that is through expert consulting, effective account management, targeted training, timely technical support, or customer care. This 360-degree approach ensures that our consulting personnel have a complete view of our customers now and where they can evolve with adoption of AA GAMA - Evaluator and ArcGIS. Esri Canada will bring to bear the full support of our comprehensive GIS consultant skillset to leverage this support approach and ensure a successful project. This intrinsic value and support are available at no extra cost to the project and serves to effectively meet the planned project objectives and schedule.

AA GAMA - Evaluator is a subscription-based software license that includes all support, maintenance, and updated versions at no additional cost. Support is defined as version upgrades, updates, bug fixes, patches, new releases, help desk support included in the annual subscription fee.

Esri Canada personnel will provide technical support for the AA GAMA - Evaluator solution including any customized or integrations. Once the solution is operational, Esri Canada will provide comprehensive ongoing operational support for the solution including support and maintenance to ensure optimal performance of the AA GAMA - Evaluator-based Mass Appraisal solution in production, with the provision of all new versions and releases.

A Service Level Schedule (SLS) will be established to define the maintenance for the AA GAMA - Evaluator services, supplementing Esri Canada's standard Maintenance Program for the AA GAMA - Evaluator product. The SLS will:

- Provide clear reference to service accountability, roles and/or responsibilities.
- Present a clear, concise, and measurable description of service provision
- Confirms the level of service to be provided
- Sets Customer perceptions for service, support, and delivery.

5. Customization Perspective

Esri Canada's is proposing a new generation, flexible, secure, open-architecture Mass Appraisal System solution built on the leading, proven SaaS-based ArcGIS platform capabilities and employing our best practises for managing, implementing, and configuring cohesive, seamless assessment cloud services that meet industry standards and deliver on the objectives and requirements of TAD.

The proposed Mass Appraisal System, AA GAMA – Evaluator, provides a COTS-First approach, a primarily out of the box, turn-key solution which leverages advanced Esri ArcGIS SaaS-based capabilities and assessment functions already built in our platform and applications. We configure and extend COTS, thus avoiding developing custom components whenever possible. Consequently, you will not be “version-locked” by custom applications unable to take advantages of the innovations in Esri COTS advances. The new solution will evolve and advance as the COTS software evolves, resulting in continual improvements. Furthermore, this keeps user and Esri improvements and

enhancements to software trackable by version, ensuring history and sustainability even if critical or important people no longer participate on the implementation team.

6. Software Enhancement Plan

Enhancements to AA GAMA - Evaluator that are applicable to a specific customer environment are designed with configurability from the start. In this way, features may be enabled and disabled for individual customers through configuration with no product customization whatsoever. Similarly, if an enhancement has been developed for a specific customer it may be made available to other customers if and when desired.

Scripting is the underlying behaviour customization mechanism used by many aspects of AA GAMA - Evaluator including business rules, workflow, custom import/export, custom scheduled jobs, and user macros with dynamic user interface. A script is a piece of code configured in the database at the time of deployment and can access anything in the application tier including data access and more. It can be thought of as a plugin that gets compiled at runtime.

For unique customer specific enhancements, Esri Canada will evaluate requests to determine if the request aligns with the overall product vision and direction and will typically incorporate the request into the product roadmap. Where enhancements are time-sensitive or deemed to be of unique value to one customer and not the customer community at large, Esri Canada will enter negotiations regarding costs to expedite development to meet the necessary target delivery.

7. Staffing Perspective

We believe in people and invest in their knowledge and development. Our handpicked team of seasoned professionals build, implement, and support our products. Our Product Team consists of Developer, DevOps Engineers, Data Engineering, QA Developers, Product Manager, and Development Manager resources. The Implementation Team includes Project Managers who are supported by our team of Application Specialists, Business Analysts, Data Migration Specialists, and Quality Assurance Specialists that drive the project's implementation phase. They are coordinated by the Professional Services Manager who oversees all implementations. The Support Team is comprised of Support Professionals and Developers that are dedicated to keeping our application stable and providing exemplary communication with our clients. All teams are supported by multiple long-tenured Certified Assessors who's combined expertise guarantees a holistic approach to development, design, and quality control, enabling us to bring our product and projects to fruition with precision.

Implementation Team

Each of our implementations consists of a highly experienced dedicated Project Manager who will be assigned as a single point of contact for TAD throughout the entire life cycle of the project. The Project Manager is supported by the Professional Services Manager who oversees all implementations. There is also a dedicated Business Analyst that works with a team of Application Specialists, Data Migration Specialists, Quality Assurance Specialist and Developers who execute the implementation.

Support Team

We have a well-structured support team in place. Comprising Technical Support Specialists and developers, this team will seamlessly take over from the implementation phase to ensure continuous operation, timely updates, and responsive issue resolution. This robust support will safeguard the project's integrity long after its initial launch.

Resource Continuity and Adaptability

We understand that project dynamics can evolve, and our resource plan is designed with flexibility at its core. Regular performance assessments and feedback loops will guide resource allocation adjustments as the project progresses. Our commitment to adaptability ensures that we can swiftly address any emerging needs or changes in project direction, all while maintaining the highest standards of quality and efficiency.

Proven Track Record

Our resource plan is underpinned by our proven track record of successful project delivery. We have previously executed projects of similar scope and complexity, showcasing our ability to assemble and manage high-performing teams that consistently meet or exceed project milestones.

Transparent Communication

Effective communication is a linchpin of our resource plan's success. We are dedicated to maintaining open lines of communication with your team, ensuring that you are informed of every step, milestone, and resource allocation adjustment. This transparency fosters trust, facilitates timely decision-making, and enhances our collective ability to overcome challenges.

Expertise

TAD will also be leveraging Esri Canada's Subject Matter Expert's (SME's) of former assessors with a combined experience of over 50 years of domain expertise. This team has successfully delivered projects worldwide utilizing their unparalleled knowledge in the application of GIS specifically, to solve assessment/appraisal management business needs. In addition, have developed, hands-on, the specialized tools and methods to optimize the configuration of the AA GAMA - Evaluator solution to deliver all required appraisal management workflows and functions for organizations.

8. Legislative Changes Plan

AA GAMA - Evaluator represents a proven state of the art technology employing features that are on-line, real-time, within a fully integrated environment, providing flexibility and ease of maintenance to effectively handle changes in TAD business rules.

As a SaaS based solution, it communicates and integrates through known, documented, and accepted IT, Web, OGC, Open Source and de-facto standards, the result is a truly vendor-neutral, scalable enterprise application. Consequently, there is no compromise or complication for future flexibility not only for technology but also criteria such as legislative changes.

The operational efficiencies, scalability and flexibility and robust design allows AA GAMA - Evaluator customers to continue to evolve with the industry and adjust their functional and technical designs to easily accommodate future changes as required by Texas State Legislature, changes in technology as well as business environment and other industry vendors. As legislation evolves, the system administrator can configure changes to the system to accommodate legislative changes or amendments primarily without vendor intervention and cost.

4. Vendor Background and Qualifications

Esri is the world's leader in GIS and Esri Canada has been delivering comprehensive services and support to these innovative technology solutions for 40 years. Esri Canada is a highly reputable, stable, successful firm fully capable of providing to TAD the specialized skilled and fully trained technicians that will perform a first-class turn-key Mass Appraisal implementation, installation and data conversion in accordance with standard industry practices. We have a proven track record in implementing such projects and delivering them on time and on/under budget.

Our company is more than 600 employees strong and includes over 260 expert professional services personnel across Canada, who provide expert consulting services in ArcGIS solutions. The Esri Canada Assessment Practice team consists of about 25 highly qualified, assessment domain experienced resources that have worked with a wide variety of large and small assessment jurisdictions across the United States, Canada and internationally, and has a proven track record in providing a complete property assessment/mass appraisal solution that delivers more precise, uniform, and cost-effective property valuations from a single integrated platform without the need to transfer data between systems, subsystems, or viewers. The unique combined know-how of this practice team will be efficiently employed to deliver industry best-practices and execute the most efficient approach to support modernization of the TAD Mass Appraisal System technology, project service delivery and program management capabilities.

Position your project for success with the help of our highly coordinated team. We have the depth of resources to see your project through. Esri Canada's property assessment team experts and domain specialists built the AA GAMA - Evaluator application hands-on in cooperation with municipal and provincial assessment agencies such as Maricopa County and BC Assessment that understood the great value and opportunity presented by integrating GIS capabilities with CAMA.

Esri Canada's Assessment Practice Team is under the leadership of [REDACTED] who was previously a Deputy Assessor for British Columbia Assessment. [REDACTED] 30 years' experience in the field of property assessment and is an accredited Real Estate Appraiser with experience that covers all property types and assessment protocols. At BC Assessment, [REDACTED] spearheaded the migration and implementation of a new Commercial CAMA system for the province. [REDACTED] has been an International Association of Association (IAAO) Body of Knowledge, Education Committee, and International Committee member helping shape international standards and best practices for IAAO. He is also the Course Instructor for University of British Columbia's Sauder School of Business "Mass Appraisal and Assessment Administration" BUSI 443 Course.

[REDACTED] consulted to various Government Officials worldwide on assessment technology, practices, policies and procedures and the structure, design, and implementation of Computer Assisted Mass Appraisal (CAMA) systems worldwide.

As Managing Director of the Assessment Practice and an industry innovator, [REDACTED] led Esri Canada's

development of AA GAMA - Evaluator and the suite of other Assessment Analyst applications.

██████████ (Director – Assessment Analyst) will help direct the Esri Canada project team as the Project Owner for the TAD Mass Appraisal System. He was a Deputy Assessor at BC Assessment, where he managed delivery of a full-scale revaluation and re-costing of industrial properties in the Lower Mainland of BC. He also provided a corporate CAMA Orientation and Training program that created and updated CAMA training materials for Appraisers, conducted instructor-led training sessions for Appraisers and trained new instructors to deliver effective training.

██████████ (Industry and Product Manager – Assessment Analyst) will also help direct the Esri Canada project team for TAD's Mass Appraisal solution. He was a Deputy Assessor at BC Assessment and was responsible for the valuation for nearly 1.8 million residential and strata properties within the Province of British Columbia. Leading a team of Data Scientists, Data Analysts, and Appraiser Modelers, ██████████ was responsible for the preliminary assessment roll that was reviewed and signed off by the Appraiser of that local market area.

Our handpicked team of seasoned professionals, including a dedicated Project Manager, Software Architects, Senior Developers, Application Specialists, Business Analysts, Data Migration Specialists, and Quality Assurance Specialists will drive the project's implementation phase. Their combined expertise guarantees a holistic approach to development, design, and quality control, enabling us to bring the project to fruition with precision.

Esri Canada offers a superior project management methodologies approach to configure solutions for a customer. Our project managers follow the ISO and ANSI recognized standards of the Project Management Institute (PMI®). In addition, Esri Canada has documented its project management standards, processes, and practices in a Professional Services Delivery Guide. The fundamental tools used in the project management approach are MS Project and Word documentation that cover Project Plans and Schedules, status meeting agendas/minutes, formal status reports and project-related documents.

As part of the Project Management methods, Esri Canada has developed a solid infrastructure for quality assurance in support of all its professional services. The Esri Canada Team's approach features a comprehensive set of strategies and tools that promote a low incidence of defects in client deliverables as they pass through the various testing stages. To optimize its quality assurance process, Esri Canada implements Quality Assurance (QA) services on a project-specific basis. The focus is on identifying critical modelling and implementation steps by closely scrutinizing all aspects of each project phase as they apply to a specific project. Developing project-specific QA procedures ensures that all aspects of the project are directed toward the fulfilment of the client's specific needs.

Esri Canada employs formal project monitoring and control processes to ensure a project is meeting the scheduled deliveries and milestones. The purpose is to track the three major project constraints – time, cost, and quality. The overall objectives in the process include:

- Regular revision of the project plan based on accomplishments and remaining work.

- Ensuring the tasks and timelines on the project's critical path are met.
- Schedule human and critical computer resources in advance of the tasks outlined in the project plan.

A systematic Quality Management Process will be undertaken to ensure that TAD's business requirements are met with quality deliverables. The deliverables will be reviewed throughout the duration of the project, in conjunction with monitoring progress, schedule, and reporting as part of the regular project status meetings. Deliverables include documentation, configuration, and user inputs. Esri Canada has an internal Design Authority (DA) that comprises senior technical resources from professional services, technical support and technical strategy groups. The DA meets to peer review proposed solutions before entering the implementation phase. The DA provides expertise and knowledge from other projects and customers. Any short falls will be identified, and a plan will be established to ensure the schedule and quality of deliverables are maintained.

Based on our experience, resources and capabilities, Esri Canada is fully capable to accommodate the full lifecycle of a project the size of the Mass Appraisal System project for TAD.

Product History

The first major sale of the COTS Assessment Analyst was the AA DTR (Desktop Review) in 2012 to Maricopa County, Phoenix AZ. The Maricopa County Assessor's Office annually notices and administers more than two million real and personal property parcels/accounts with a full cash value of nearly \$US 320.2 billion. Between 2012 and 2016, Esri Canada successfully configured, implemented, integrated, and supported the AA DTR installation at Maricopa County. As a result, the County experienced very significant increases in assessment efficiencies, accuracy, and revenues. Consequently, in December 2016, the Maricopa County Board of Supervisors selected Esri Canada to extend the AA DTR functions and capabilities to provide an enhanced CAMA capability with an end-to-end assessment/valuation management database, the AA GAMA - Evaluator solution. Between 2016 and 2022, Esri Canada staged the installation of a new cloud-based AA GAMA - Evaluator environment at Maricopa County, using an Agile Software Development approach with quarterly Software Releases including 4-6 development sprints in each release.

The Maricopa AA GAMA - Evaluator project scope executed by the Esri Canada team included cloud-based architecture, integrated GIS, workflows, reporting, valuation on the fly, and mobile technology designed to manage approximately the two million parcels and seven years of historical data which has been converted and migrated to AA GAMA - Evaluator. As a result, the County experienced further, very significant increases in assessment efficiencies, accuracy and revenues. It is now a core technology for the County's assessment process.

The AA GAMA - Evaluator solution deployed at Maricopa County replaces traditional CAMA by leveraging and refining the core mass appraisal administration and valuation capabilities of AA DTR and adding more efficient geo-enhanced functions and workflows. For example, a range of enterprise and SaaS-based AA GAMA - Evaluator functionality was developed, configured, and installed specifically to meet

the demanding operational needs of Maricopa County including but not limited to tools for refined analysis and workflows, property ownership administration, integrations, real property and account valuation, assessment rolls and notices, etc. Thus, what we are proposing to TAD is much more than a typical CAMA. It is a new generation system that delivers improved, innovative capabilities and outcomes.

Esri Canada has installed, converted, supported and maintained AA GAMA - Evaluator since 2016 at Maricopa County. AA GAMA - Evaluator is intended to be delivered around a core product framework that has a quarterly release cycle. There are typically four main application releases planned each year within which Esri Canada plans the delivery of enhanced functionality and the updated product framework. All interfaces and plugins are tested for compatibility with each of these major releases, and the customer is provided an opportunity to schedule the upgrade to meet business needs.

The AA GAMA - Evaluator is a proven, functioning mass appraisal system. Maricopa County is a good example of a mature solution with successful completion of three Appraisal Cycles.

AA GAMA – Evaluator is fully supported and undergoes continuous improvement. The history of the versions of the AA GAMA – Evaluator demonstrates continued evolution with the latest advancements in GIS and functions that align with expectations and requirements associated within the Appraisal Industry. In the last two releases the following items were included:

- System upgrades



- Three ways to subscribe to GAMA
 - Consolidation of product offerings into one single application with three subscriptions
- Configurable valuation calculations

- o [Redacted]

An overview of the timing of AA GAMA - Evaluator release versions which are part of annual product upgrades is provided in the following table.

Timeline	Releases	Notes
Mar-20	Beta.1.XXXX.XX	major.minor.buildID.PullReqNo
Jun-20	Beta.2.XXXX.XX	
Sep-20	Beta.3.XXXX.XX	
Dec-20	Beta.4.XXXX.XX	
Mar-21	0.1.XXXX.XX	
Jun-21	0.2.XXXX.XX	
Sep-21	0.3.XXXX.XX	
Dec-21	0.4.XXXX.XX	
Mar-22	1.1.XXXX.XX	
Jun-22	1.2.XXXX.XX	
Sep-22	1.3.XXXX.XX	
Dec-22	1.4.XXXX.XX	
Mar-23	2.1.XXXX.XX	
Jun-23	2.2.XXXX.XX	
Sep-23	2.3.XXXX.XX	
Dec-23	2.4.XXXX.XX	
Jun-24	3.1.XXXX.XX	
Dec-24	3.2.XXXX.XX	

5. Manufacturer Affiliation

AA GAMA - Evaluator is built directly on the Esri ArcGIS platform and is consequently subject to the licensing of that Esri software. Esri Canada is the exclusive distributor of Esri ArcGIS software in Canada. Esri Canada developed AA GAMA - Evaluator hands-on and owns the trademark and IP of the AA GAMA - Evaluator application itself.

6. Reference List

- 1. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running the proposed application software in Texas.**

We currently have not delivered Assessment Analyst to any organizations in the State of Texas; however, our expanding customer base already covers assessment organizations across the U.S including in FL, KY, NC AZ, HI, NM, SC, IA, WI.

[REDACTED]

- 2. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running the proposed application software outside Texas.**

As in #1 above.

- 3. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running any legacy software in Texas.**

As in #1 above.

- 4. If Vendor has no customers in Texas, Vendor should state that fact and provide a list of all out-of-state customers using Vendor's system similar to that which is being proposed.**

We currently have not delivered Assessment Analyst to any customers in the State of Texas.

[REDACTED]

[REDACTED]

5. Reference Projects

Reference #1

Customer Name	Maricopa County, AZ, US
Contact Information	<p>Stephen Hamman Director of IT Maricopa County, Arizona Office of the Assessor Phone: (602)-510-5260 Steve.hamman@maricopa.gov</p>
Product Use/Configuration	<p><u>MARS (Maricopa Assessment Replacement System)</u> The mission of the Assessor's Office is to administer all laws and regulations efficiently and effectively for Maricopa County property owners so that all ad valorem property is fairly and equitably valued. The Maricopa County Assessor's Office annually notices and administers approx. 1.7 million real and personal property parcels/accounts with a full cash value of nearly \$US 320.2 billion.</p> <p>The MARS (Maricopa Assessment Replacement System) project represents a methodical long-term development of Esri Canada's assessment and valuation technology applications.</p> <p>Esri Canada began a business relationship with Maricopa County in 2012 by delivering to them our Commercial off the Shelf (COTS) Assessment Analyst Desktop Review (AA DTR) product. In December 2016, the Maricopa County Board of Supervisors selected Esri Canada to spearhead the MARS project by extending the AA DTR functions and capabilities to provide an enhanced, end to end assessment/valuation management database; the GAMA system.</p> <p>Maricopa County has a vision to be a recognized leader in the property tax assessment and administration field. Esri Canada's GAMA product represents a new generation approach to assessment and valuation management and thus assists them in achieving this progressive vision.</p> <p><u>Description of the scope and scale of services including cloud services implemented</u> The AA GAMA - Evaluator project scope executed by the Esri Canada team included cloud-based architecture, integrated GIS, workflows, reporting, valuation on the fly, and mobile technology designed to manage approximately 1.7 million parcels and 7 years of historical data which has been converted and migrated to GAMA.</p>

	<p>Contract commenced in 2016. Between 2016 and 2022, Esri Canada staged the installation of a new cloud-based AA GAMA - Evaluator environment at Maricopa County, using an Agile Software Development approach with quarterly Software Releases including 4-6 development sprints in each release between Q1 2017 and Q4 2022.</p> <p>The Assessment Analyst GAMA system deployed, leveraged the core mass appraisal administration and valuation functions of AA DTR. During this period, enterprise and SaaS- based GAMA functionality was developed, configured and installed including but not limited to tools for Property Ownership Administration, Integrations, Real Property and Account Valuation, Assessment Rolls & Notices, Workflows, etc.</p> <p>Ongoing services and deliverables at Maricopa County include technical support.</p> <p>Date contract signed: December 7, 2016 Date of legacy system decommissioned: October 2022</p>
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**Maricopa County Recognized Again for Innovation in Property Assessments
2016-12-15**

TORONTO –December 15, 2016 – Esri Canada congratulates Maricopa County for receiving the Arizona Association of Counties’ 2016 Summit Award, which recognizes county programs that deliver positive impact through creative innovation. The County was selected for improving assessment workflows using [Assessment Analyst](#), Esri Canada’s desktop property review solution that increases the speed and accuracy of mass appraisals. This is the second recognition that the County has received for the project; it also won the National Association of Counties’ 2016 Achievement Award in June.

“Since implementing Assessment Analyst, Maricopa County has significantly increased the efficiency and accuracy of mass property appraisals,” said Michael Lomax, director, Assessment, Esri Canada. “By leveraging our advanced spatial modelling, visualization, and analytical tools, they’ve reduced the need for physical inspections, while complying with regulatory standards for desktop reviews. We’re pleased that our solution has enabled them to take a more innovative approach to assessments.”

In 2013, Assessor Paul D. Petersen initiated the County’s [Residential Desktop Recanvassing Program](#), with the goal of recanvassing all its residential parcels to capture any changes made to properties. The County used Assessment Analyst to re-assess a pilot area of 50,000 parcels covering North Phoenix and East Glendale and will recover an estimated \$2.5 million in additional tax revenue in 2016 for all jurisdictions.

With the pilot project providing a 5:1 return on investment; the County has renewed its agreement with Esri Canada to use Assessment Analyst to revalue all 1.2 million residential parcels in its jurisdiction over the next 10 years. The second phase of the project, which was completed for the 2017 tax roll, reviewed an additional 60,000 parcels. This will help the County recover an estimated \$6.5 million in tax revenue, increasing its ROI from Assessment Analyst to 8.8:1. The third phase of the program, which covered 100,000 parcels, was recently completed for the 2018 tax roll. Those values will be noticed to property owners in early 2017.

“Sending appraisers on site usually takes a minimum of 45 minutes, not including travel time from the Assessor’s Office,” noted Tim Boncoskey, chief deputy assessor, Maricopa County. “By developing a truly state-of-the-art methodology and using Assessment Analyst, our appraisers now have the ability to review and measure a parcel in compliance with IAAO standards within 15 minutes and be accurate within a one-inch error of margin from their workstations.”

Maricopa and Maui Counties Win Awards for Use of Assessment Analyst Desktop property review solution increases speed and accuracy of mass appraisals 2016-08-26

TORONTO – August 26, 2016 – Esri Canada congratulates Maricopa County for receiving the National Association of Counties’ 2016 Achievement Award and Maui County for winning the Esri Special Achievement in GIS Award. The counties were recognized for improving their assessment workflows using [Assessment Analyst](#), Esri Canada’s desktop property review solution that allows assessors to leverage advanced spatial modelling, visualization and analytical tools to conduct efficient and accurate mass property appraisals.

“Many assessment organizations don’t have the resources to physically inspect every property within their jurisdiction,” said Michael Lomax, Director, Assessment, Esri Canada. “As well, a lot of subjectivity goes into assessing a property’s value. By using Assessment Analyst, Maricopa and Maui Counties have reduced the need for physical inspections, while complying with regulatory standards for desktop reviews. We’re exceptionally proud that our solution has allowed them to be more efficient and successful in their operations.”

Maricopa County, Arizona wins 2016 National Association of Counties Award

Maricopa County was recognized for its [Residential Desktop Recanvassing Program](#), which was initiated by Assessor Paul D. Petersen in 2013. The goal of the project is to recanvass all residential parcels in the County to capture any changes made to properties. The County selected Assessment Analyst in 2013 to re-assess a pilot area of 50,000 parcels covering North Phoenix and East Glendale and will recover an estimated \$2.5 million in additional tax revenue in 2016 for all jurisdictions. Following the tremendous success of the pilot project which saw a 5:1 return on investment; the County has renewed its agreement with Esri Canada to use Assessment Analyst to revalue all 1.2 million residential parcels in its jurisdiction over the next 10 years.

“Sending appraisers on site usually takes a minimum of 45 minutes, not including travel time from the Assessor’s Office,” noted Tim Boncoskey, chief deputy assessor, Maricopa County.

“By developing a truly state-of-the-art methodology and using Assessment Analyst, our appraisers now have the ability to review and measure a parcel in compliance with IAAO standards within 15 minutes and be accurate within a one-inch error of margin from their workstations.”

Reference #2

Customer Name	Service New Brunswick
Contact Information	<p>Trevor Hanley Manager Registries & Operational Support Unit) Service New Brunswick office number: 506-476-3267 Trevor.hanley@snb.ca</p>
Product Use/Configuration	<p>Service New Brunswick engaged Esri Canada for the implementation of the AA GAMA - Evaluator solution to replace their current system for its approx. 35,000 buildings and 28,000 parcels/estimates which will require to be migrated. The scope of the project consists of requirements for their assessor to be able to see costing data entered by other assessors, handle large volumes of data, must scale to the number of employees that will need access (30 users), capable of performing Mass appraisal cost model, Individual cost model with ability to use base year with the last 5 years, be able to enter cost one core more building segments per parcel.</p> <p>With AA GAMA - Evaluator’s API integration with the Marshall and Swift Online Cost estimator, Service New Brunswick can value all the commercial cost properties efficiently and effectively now within AA GAMA - Evaluator and take advantage of the most up to date commercial cost data sets.</p> <p>Date contract signed: November 2, 2021 Date of legacy system decommissioned: March 2023</p>

Reference #3

Customer Name	Greenville County, South Carolina
Contact Information	<p>Donnal Chai Greenville County Assessor Office of the Assessor phone: 864-467-7345 dchai@greenvillecounty.org</p>
Product Use/Configuration	<p>The project with Greenville consists of 2 sub-projects. Phase 1 consists of data cleanup and implementation of DTR and GeoSketch for 235,000 parcels. This allowed all the sketches to be converted, georeferenced and verified. Geo-sketch layer was then created and ready for the AA GAMA - Evaluator implementation in phase 2. The sketch verification process includes linking the building polygons to the parcel, manually georeferencing / rotating each polygon to be placed over an ortho image. Each building polygon will be compared to what is on the imagery and the parcel is given a score based on the building variances to the ortho imagery.</p> <p>Phase 2 was the implementation of the AA GAMA - Evaluator solution by the Esri Canada Assessment team to include a cloud-based architecture, integrated GIS, workflows, reporting, valuation on the fly.</p> <p>Date contract signed: June 24, 2021 Date of legacy system decommissioned: September 2024</p>

7. Registration of Vendor

Esri Canada has applied for a certificate of authorization for the right to transact business within Texas. Our application for that certificate registration is pending at the time of submitting this proposal. The letter confirming that the application is in process is presented in Section 22 of this proposal.

8. Submission of Proposals

Esri Canada complies with all mandatory submission requirements set out in the RFP document. Esri Canada acknowledges that mandatory submissions are not the sole requirements, and that RFP conditions and requirements are considered binding.

9. Multiple Proposals

N/A

10. Authorization to Bid

Esri Canada executive have authorized this bid submission. Please see cover letter.

11. Submission of Vendor Contracts

Section 20 provides an Esri Canada sample standard "Procurement Agreement" for the proposed services output deliverables. Section 21 provides a sample AA GAMA - Evaluator "License Agreement".

12. Installation, Integration and Testing

Esri Canada proposes an Agile methodology for the AA GAMA implementation. We are very experienced in successfully delivering this project management process. The Agile methodology is a way to efficiently manage a project by breaking it up into several discrete phases with constant collaboration between project teams and continuous improvement at every stage. The Agile-inspired project management

approach proposed by Esri Canada will be structured to break traditional silos, energize team members, ensure consistent examination, and feedback, and deliver value frequently.

Esri Canada utilizes a multiple data refresh methodology that allows the client to continue to use their incumbent system up until the last cutover data refresh. This is our preferred methodology as it reduces business risk and allows for iterative data cleansing within the incumbent system.

Esri Canada has provided a detailed project work plan in Section 13 and with milestones in the delivery description section (Section 16) of this proposal. Section 13 outlines our 6 key work streams: Project Management, Data Migration, Business Analysis, Configuration, Quality assurance, and Training. This plan details the major tasks required to implement AA GAMA from contract initiation to Go-Live and project closer.

As a SAAS application, AA GAMA – Evaluator does not require any hardware installation, however, TAD will have access to the environment within sixty days of contract award.

13. Proposal Requirements

Timeline

The following table presents a detailed proposed timeline for the full implementation cycle of the new Mass Appraisal System at TAD. The table outlines key milestones, their respective end dates, the deliverables associated with each milestone and a description of task work. This timeline provides a clear overview of the project's progression and helps to ensure that all necessary steps are completed in a timely and organized manner. The timeframe assumes project kick-off in early August 2024 and completion in August 2025.

			<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>	<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>

			<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>

			<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>

			<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>	<p>[REDACTED]</p>

Hardware

Esri Canada's AA GAMA - Evaluator does not deploy onto on-site hardware components. It is an Azure cloud based SAAS (Software as Service) product, hosted by Esri Canada. Esri Canada will be responsible to host SQL data servers, the serverless application server, and integration with other components required for the AA GAMA – Evaluator application. TAD will be responsible to acquire and install their own licenses for 3rd party integration components such as SharePoint, Cyclomedia etc.

The Field appraisal application will require mobile devices, network service etc. to collect data in the field. We assume that TAD will use existing devices or procure this portable hardware.

Software

Esri Canada is a SAAS product. Esri Canada will host the AA GAMA - Evaluator solution in the MS Azure cloud environment. AA GAMA - Evaluator is thus designed to be highly scalable (vertically and horizontally) based on the peak workloads. There is no issue in supporting more than 200 concurrent users (133 appraisal and 67 support staff).

Training

Esri Canada utilizes both formal and informal methodologies of training. The formal training utilizes a "Train-the-Trainer" methodology. This involves the training of a select number of staff to a highly detailed level of knowledge on our Commercial-off-the-shelf (COTS) training material. We then support these trainers in their efforts to train all staff within the organization going forward. Informally, training and knowledge transfer also occur routinely throughout the implementation. The primary avenues of informal training are, a project kick-off system introduction and basic navigation training, sprint deployment demos, requirement gathering walkthroughs, and functional testing.

The "Train-the-Trainer" methodology is a comprehensive training course conducted preceding Go-live performed at the client's site. The course work is designed for about 10 trainees and is performed over a maximum of 7 days. The cost of the training sessions is included in the cost section (Section 15) of this proposal.

The training process begins by providing system administrators and TAD's project team with dedicated assistance and incremental training throughout implementation. This approach ensures that the core team is well-versed in the technology and is equipped to absorb the COTS Train-the-Trainer material when it is delivered. This ensures that they are experts in the system and are able to impart their expertise to the broader user base.

Our proposed Train-the-Trainer training is designed to empower TAD trainers with the essential knowledge, tools, and information required for the successful development and sustainability of end-user training initiatives. The goal is to establish a self-sufficient training ecosystem that continues to thrive post-implementation.

By investing in TAD's trainers' expertise, Esri Canada will support TAD's preparation of end business

user training materials. We have been very successful in this approach and are confident that our comprehensive Train-the-Trainer methodology will empower TAD’s training resources to deliver high-quality, impactful training experiences, fostering successful technology adoption among end users going forward.

In the project initiation phase a detailed training plan will be delivered to outline the training approach, who to train, how training will be conducted, training logistics, and training topics. The Training Plan will be updated throughout the project with more details on functional groups, courses (with outlines), classroom schedules, etc. based on deliverable timelines and with agreement by both TAD and Esri Canada.

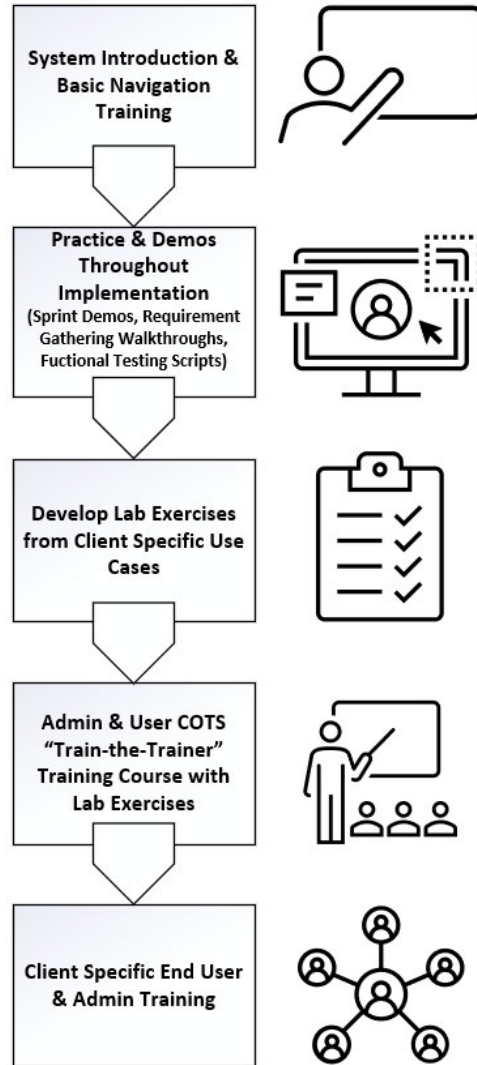
The tables below show an example high-level plan of our suggested formal training delivery methodology. Based on our experience, this format provides the optimal combination of training to allow for a self-sufficient training ecosystem to be established that continues post-implementation.

Should TAD wish to receive more intensive training in our solution for a broader number of users, we can discuss that during the project initiation. Esri Canada can accommodate that with a Change Request for scope of training.

Course	Content	Responsible Delivery Party	Number of Trainees	Duration (Max.)	Location
Admin Train-the-Trainer Sessions	- TAD-Specific Lab Exercises Creation - AA GAMA - Evaluator COTS Admin Train-the-Trainer Course	Esri Canada	3	16h	On-site
User Train-the-Trainer Sessions	- TAD-Specific Lab Exercises Creation - AA GAMA - Evaluator COTS User Train-the-Trainer Course	Esri Canada	10	40h	On-site
End User Training	- Business specific end user training on internal workflows	TAD	Unlimited	n/a	On-site

Material	Content	Responsible Delivery Party
AA GAMA - Evaluator COTS Admin Manual	- Online Help Manual for system administration	Esri Canada
AA GAMA - Evaluator COTS User Manual	- Online Help Manual for system Use	Esri Canada
AA GAMA - Evaluator COTS Admin and User Train-the-Trainer Course	- PowerPoint training course document	Esri Canada
TAD Specific Lab Exercises	- Lab exercises that showcase real business processes used by TAD. - The scenarios are provided by TAD	Esri Canada
TAD Specific End User Training Course	- An augmented version of the AA GAMA - Evaluator COTS Admin and User Train-the-Trainer Course that the client has made specific to their business uses	TAD
TAD Specific Admin Manual	- An augmented PDF version of AA GAMA - Evaluator COTS Admin Manual that the client has made specific to their business uses - This can be hosted within the applications help section	TAD
TAD Specific User Manual	- An augmented PDF version of AA GAMA - Evaluator COTS User Manual that the client has made specific to their business uses - This can be hosted within the applications help section	TAD

Below is a schematic of the high-level training plan elements:



Parallel Operation

Esri Canada supports parallel operation of the incumbent system and AA GAMA - Evaluator throughout implementation by utilizing multiple data refreshes. This methodology will allow TAD to continue to use their incumbent system up until the last cutover data refresh. This is our preferred methodology as it reduces business risk and allows for iterative data cleansing within the incumbent system.

In practice this methodology follows the following principles:

1. TAD uses the incumbent system throughout implementation until a successful cutover is completed.
2. Esri Canda will preform 3 trial data loads throughout implementation.
 - a. Round 1 data load: Load the current assessment year data into the system.
 - b. Round 2 data load: Refresh the current assessment year data and load historical year data.

- c. Round 3 data load: Refresh the current assessment year data (practice for the final cutover data load)
3. Esri Canada will preform 1 final cutover data load.
 - a. TAD will need to ensure no data changes are made in the incumbent system during the cutover data load period.
4. Cutover is completed and TAD uses AA GAMA - Evaluator as the system of record. The incumbent system is no longer used.

Installation and Conversion

Methodology

Esri Canada proposes an Agile methodology for the AA GAMA implementation. The Agile methodology is a way to efficiently manage a project by breaking it up into several discrete phases with constant collaboration between project teams and continuous improvement at every stage. The Agile-inspired project management approach proposed by Esri Canada will be structured to break traditional silos, energize team members, ensure consistent examination, and feedback, and deliver value frequently. Esri Canada also believes that frequent on-site visits will facilitate a more robust agile process. We estimate that we will be onsite approximately once a month throughout implementation.

Once the work begins, teams will cycle through a process of planning, executing, and evaluating. At the core of the Agile methodology is the principle that project tasks are flexible and can be modified during the project. The approach rests on two core concepts: The Backlog and the Sprint. The Backlog refers to the tasks and deliverables yet to be done. The Sprint refers to the work currently being done. Each Sprint is scoped to be about 15 days. After each Sprint, the Sprint will be reviewed jointly by TAD and Esri Canada, and the content of the next sprint will be refined.

All development/configuration items on each Sprint or in the Backlog will be available to be viewed by TAD in our development planning tool (Target Process). Target Process also allows communication between Esri Canada and TAD to enable collaboration on all outstanding work items or defects in a consolidated environment.

During Implementation TAD will use their current system as their system of record. Extracts of the current assessment period's data will be requested throughout the project in order to "refresh" the in the AA GAMA – Evaluator system. Upon the cutover process there will be a period of time where we perform a practiced extract and load where TAD will be required to not change any data in their incumbent system. After this final load, TAD will be cutover to the AA GAMA - Evaluator as the system of record. This is supported by acceptance of the system via user acceptance testing and training prior to completion.

Processes, Activities, Templates, & Tools

- The proposed AA GAMA - Evaluator implementation includes the following service components:

1 Project Management:

Project Schedule

- Esri Canada will develop a baseline project schedule in consultation with TAD. This includes an Implementation Schedule and a Milestone/Invoicing Schedule. These may be communicated as part of a master schedule or as individual documents. A proposed schedule has been outlined in the delivery description section (Section 16) with milestones in Section 13 which scopes an approximate 1-year implementation period.

Project Charter

- Esri Canada will work collectively with TAD to produce a Project Charter. TAD will be responsible for the documentation and accuracy of the Project Charter with consultation and agreement from Esri Canada. The charter will include, at a minimum: Overview, Objective, Scope, Approach, Deliverables, Project Constraints & Dependencies, Completion Criteria, Success Criteria, and RACI Matrix.

Requirements Traceability Matrix (RTM)

- Esri Canada will create and Maintain the RTM utilizing our Target Process software. TAD will be trained on how to access this information dynamically. Target Process and the RTM is a real-time dynamic system, and as such, it is TAD's responsibility to extract information from Target Process if point-in-time reporting is required.

RAID Log

- Esri Canada and TAD will work collectively to maintain all Risks, Actions, Issues, and Decisions. The logging of these items will utilize the Esri Canada hosted SharePoint Online project site.

Data Migration Plan

- Esri Canada will produce a Data Migration Plan while initial data investigation activities occur. We do not anticipate any large deviations from our standard data migration practices.

Business Analysis Plan

- Esri Canada will produce a Business Analysis Plan while initial data investigation activities occur. We do not anticipate any large deviations from our standard Business Analysis practices.

Configuration Plan:

- Esri Canada will produce a Configuration Plan. We do not anticipate any large deviations from our standard configuration practices.

Testing Plan

- Esri Canada will produce a Testing Plan. We do not anticipate any large deviations from our standard testing practices.

Training Plan

- Esri Canada will produce a Training Plan. We do not anticipate any large deviations from our standard Train-the-Trainer practices. This includes the delivery of a COTS Admin Manual, COTS User Manual, COTS Train-the-trainer Course, TAD Specific Lab

Exercises (Scenarios provided by TAD), Train-the-Trainer delivery (maximum 40 hour, for 10 trainers). TAD will be responsible for assisting with End-User training content creation and End-user Training.

Meetings

- Daily Standups – Esri Canada holds internal daily standups to organize work plan activities.
- Weekly Project Coordination Meeting - Esri Canada will host and coordinate Weekly Project Meetings to review Risks, Actions, Issues, and Decisions. As well to coordinate and set discipline-focused meetings (Data Migration, Business Analysis, Configuration, Testing, Training)
- Bi-Weekly Project leadership Meetings - Esri Canada will host and coordinate Bi-Weekly Project Leadership Meetings to review Project timelines and progress.
- Monthly Steering Committee Meetings – TAD will host and coordinate Monthly Steering Committee Meetings to align strategic objectives. This includes at minimum, A high level project update, KPIs, Risks, Resourcing, Change Requests, Decision-Making, Document review and approvals, Communication strategies, Community & Stakeholder engagement.

2 Technical Setup

Environment Setup

- Esri Canada will take a staged approach to environment setup. Initially, Esri Canada will set up three (3) environments; Development, Testing (Used by Esri Canada), and UAT (used by TAD for testing throughout implementation)
- Towards the end of the implementation, Esri Canada will also setup 2 additional environments; Stage (Used by Esri Canada as a replication of production) and a Production environment (used by TAD in a Go-live State)

SQL Server Reporting Service (SSRS) Setup

- Esri Canada will set up SQL Server Reporting Service for out-of-the-box reporting. TAD will be required to provide a license for TAD-side custom report configuration and hosting costs for additional storage if required.

Single Sign-On (SSO) Setup

- Esri Canada will work with TAD to set up single sign-on if required, provided that TAD uses an OpenID connect provider's SSO services.

Document Storage Setup

- Esri Canada will work with TAD to integrate TAD-side document storage, provided that TAD utilizes SharePoint Online. Other document storage providers may be capable of integration. It will be TAD's responsibility to cleanse/structure the data to fit the required structure that AA GAMA - Evaluator utilizes.

3 Data Migration

Data Inventory and Analysis

- Esri Canada will work with TAD to inventory and analyze all data sources. All data sources must be provided at the beginning of the project.

Data Mapping and Transformation

- Esri Canada will work with TAD to map relevant TAD data to the AA GAMA - Evaluator schema; we will also work with TAD to identify and perform transformations that will be needed. This will include the population of a data mapping worksheet TAD.

Data Validation and Cleansing

- Esri Canada will work with TAD to conduct Data Validation. TAD will be responsible for data cleansing activities to adhere to the AA GAMA - Evaluator schema.

Extract data from current sources

- TAD will provide data extracts from their current sources. 5 extracts will be required throughout the implementation.

Data Loading

- Esri Canada will load the relevant validated and cleansed data extracts into the AA GAMA - Evaluator schema 4 times throughout the implementation; 3 iterative trial data loads and 1 final Go-Live data load.

Data Activities Tracking

- Esri Canada will track all data migration activities (Extract Deliveries, Mapping, Transformation, Validation, Cleansing).

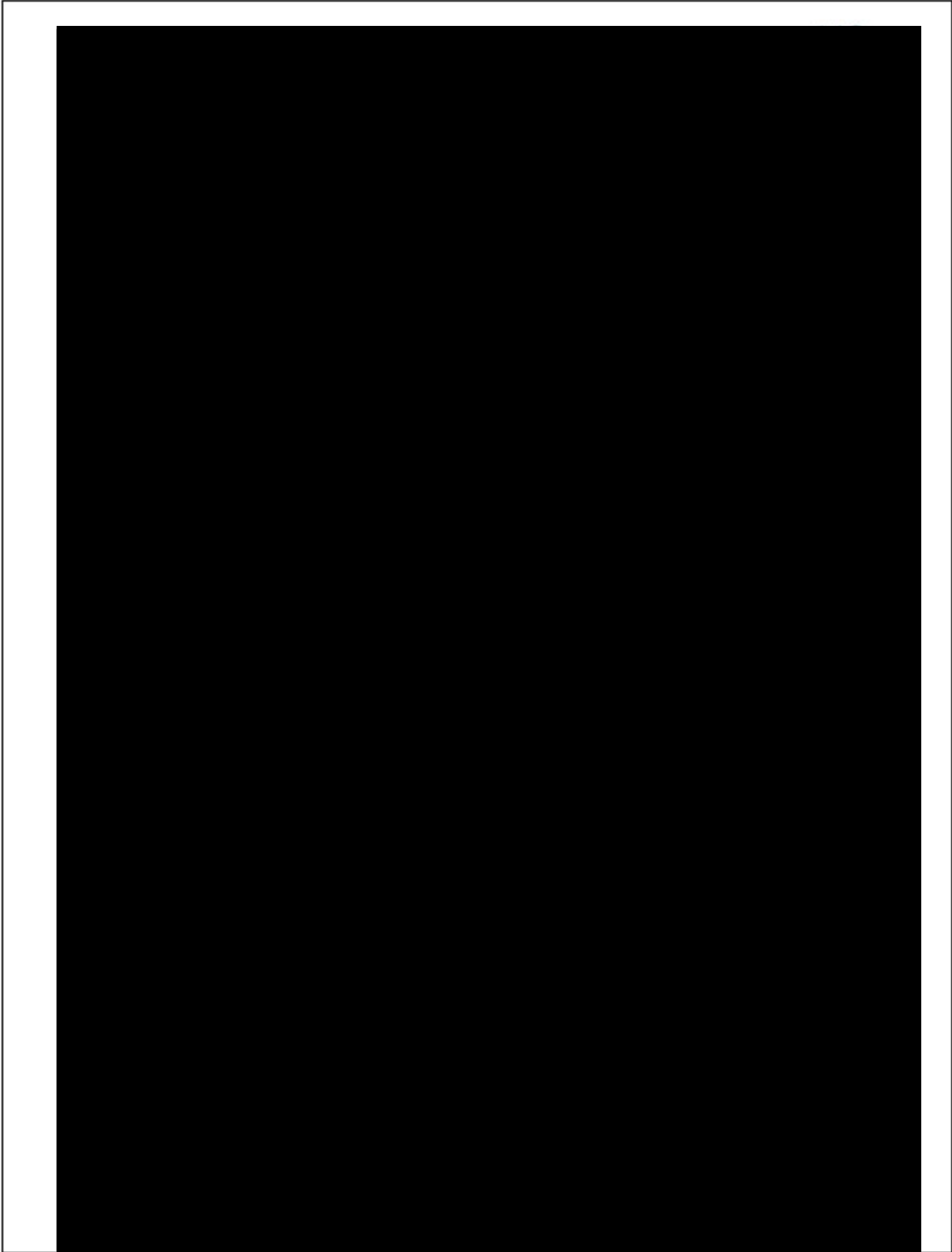
4 Business Analysis

Maintenance of Target Process

- Esri Canada will maintain Target Process. However, TAD will be required to complete business analysis documentation, log defects, review test plans, and communicate within the application.
- Esri Canada will provide TAD applicable users log in credentials to the Target Process application

Business Requirements Analysis Document (BRAD) completion

- Esri Canada will template the structure for BRAD completion; TAD will be required to complete sections of the [REDACTED] and approve requirements statements and acceptance criteria. An example is as follows:



Requirements Gathering Sessions

- Esri Canada will host requirement gathering sessions to review and solidify understanding of business needs, business processes, requirement statements and acceptance criteria.
- These sessions will be hosted virtually or at TAD's offices. We estimate that Esri Canada will host a minimum of 12 onsite sessions at TAD.

Requirements Approval

- TAD will be required to approve requirement statements and acceptance criteria prior to configuration commencing.

Change Request Analysis Document (CRAD) Completion

- Esri Canada will template the structure for CRAD completion; TAD will be required to complete sections of the CRAD document and approve requirements statements and acceptance criteria.

Change Requests

- If appropriate, Esri Canada and TAD will work collectively to create, review, and approve change requests as they arise. These include scope, timeline, or budget changes.

5 Configuration

Development Analysis & configuration

- Esri Canada will configure the Mass Appraisal System solution (AA-GAMA Evaluator) requirements based on the information gathered throughout the Business Analysis and Quality Assurance processes in accordance with our COTS application product abilities.

Deployments

- Esri Canada will provide deployments after each sprint throughout configuration periods unless otherwise mutually agreed upon. Throughout implementation, these deployments will be released to the TAD UAT environment in which TAD testing will occur.

6 Quality Assurance

Pre-Deployment Functional/Regression Testing

- Before deployments to TAD's UAT environment, Esri Canada will perform Pre-Deployment Functional testing, Smoke Testing, and Regression testing.

Deployment Reference Document

- Esri Canada will provide Release Notes outlining what is being released in each deployment. This will also include a record of the Smoke testing performed to verify the deployment.

Functional testing (On-Script)

- Esri Canada will perform Functional testing prior to the deployment of all features to be deployed. TAD will also perform Functional testing after the deployment is completed.

Off Script testing

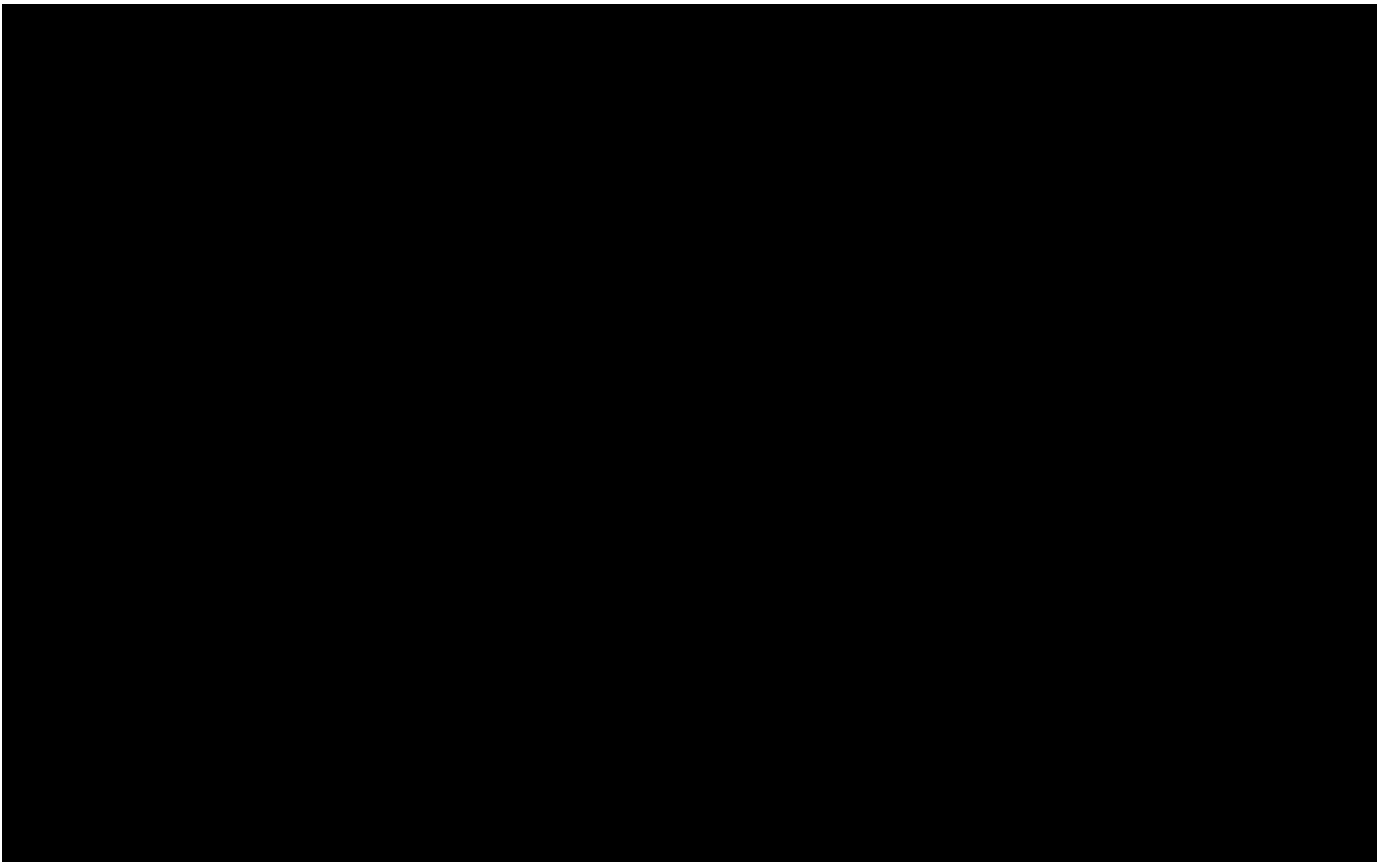
- TAD is encouraged to conduct off-script testing and provide feedback on quality, usability, and opportunities for improvement.

Defect Logging

- Both TAD and Esri Canada will log defects (bugs) as they arise throughout any testing period. These defects will be logged within our work management system (Target Process). TAD will be required to relate the defect to any related US, Defect, or Feature.

Severity (Sev) level recommendation

- TAD will provide a Severity Level recommendation for defects that arise through and post implementation. [REDACTED]



- Esri Canada will review Severity recommendations and may discuss reallocation of severity if a workaround exists.

First Pass Defect Triage

- Esri Canada will conduct an initial review and categorization of defects to eliminate duplicates, errors, and training-related issues.

Second Pass Defect Triage

- Esri Canada will perform a detailed analysis of defects, estimate effort, and assign responsibilities for resolution. Input is sometimes required from TAD.

Functional Development Test Script Creation

- Esri Canada will create test scripts within Target Process. These test scripts will be used for On Script testing.

UAT Test Script Creation

- TAD will use the Functional Development Test Scripts to produce UAT test scripts that reflect TAD’s full business processes.

User Acceptance Testing

- TAD will conduct User Acceptance Testing using the UAT Test Scripts that they have created. Acceptance will be held to the requirements identified in the contract and Esri Canada’s response regarding the solution’s capabilities.

7 Training

AA GAMA COTS Admin Manual Creation

- Esri Canada will provide an Admin Manual that outlines all Commercial Off the Shelf aspects of the system.

AA GAMA COTS User Manual Creation

- Esri Canada will provide a User Manual that outlines all Commercial Off the Shelf aspects of the system.

AA GAMA COTS Train-the-Trainer Course

- Esri Canada will provide train-the-trainer course materials that reflect all the relevant Commercial Off the Shelf aspects of the system.

TAD-Specific Lab Exercises Creation

- Esri Canada will work with TAD to define TAD-specific lab exercises that will be included as part of the Train-the-Trainer Course.

Train-the-Trainer Delivery

- Esri Canada will deliver Train-the-Trainer course to up to ten (10) trainers.

End-User Training Content

- TAD will be responsible for creating End-User Training content.

End-User Training

- TAD will be responsible for delivering End-User Training content.

8 Cutover

Change Management Plan

- Esri Canada will support TAD in the development of a change management plan.

Final Performance/Load Testing Creation

- Esri Canada will perform performance/load testing prior to the final deployment.

Penetration Testing

- Esri Canada will perform Security testing, including in-house penetration and vulnerability testing.

9 Deliverables

Software Environments

- One (1) fully configured UAT environment
- One (1) fully configured Production environment
- One (1) fully configured Training Environment

Databases

- One (1) Reporting Database
- One (1) ARB Database

Project Quality Standards

Esri Canada offers a superior project management methodologies approach to configure solutions for a customer. Our project managers follow the ISO and ANSI recognized standards of the Project Management Institute (PMI®). In addition, Esri Canada has documented its project management standards, processes, and practices in a Professional Services Delivery Guide. The fundamental tools used in the project management approach are MS Project and Word documentation that cover Project Plans and Schedules, status meeting agendas/minutes, formal status reports and project-related documents.

As part of the Project Management methods, Esri Canada has developed a solid infrastructure for quality assurance in support of all its professional services. The Esri Canada Team's approach features a comprehensive set of strategies and tools that promote a low incidence of defects in client deliverables as they pass through the various testing stages. To optimize its quality assurance process, Esri Canada implements Quality Assurance (QA) services on a project-specific basis. The focus is on identifying critical modelling and implementation steps by closely scrutinizing all aspects of each project phase as they apply to a specific project. Developing project-specific QA procedures ensures that all aspects of the project are directed toward the fulfilment of the client's specific needs.

Esri Canada employs formal project monitoring and control processes to ensure a project is meeting the scheduled deliveries and milestones. The purpose is to track the three major project constraints – time, cost, and quality. The overall objectives in the process include:

- Regular revision of the project plan based on accomplishments and remaining work.
- Ensuring the tasks and timelines on the project's critical path are met.
- Schedule human and critical computer resources in advance of the tasks outlined in the project plan.

A systematic Quality Management Process will be undertaken to ensure that TAD's business requirements are met with quality deliverables. The deliverables will be reviewed throughout the duration of the project, in conjunction with monitoring progress, schedule, and reporting as part of the regular project status meetings. Deliverables include documentation, configuration, and user inputs. Esri Canada has an internal Design Authority (DA) that comprises senior technical resources from professional services, technical support and technical strategy groups. The DA meets to peer review proposed solutions before entering the implementation phase. The DA provides expertise and knowledge from other projects and customers.

Any short falls will be identified, and a plan will be established to ensure the schedule and quality of deliverables are maintained. The following diagram describes the process to be followed to assure and control the quality of deliverables within the project.

Accountabilities and Responsibilities

- Esri Canada assumes that both Esri Canada and TAD will follow the accountabilities and responsibilities described for each role in the following sections:

1. Governance Model

Our implementation process utilizes a Matrix Governance Model. It is a balanced and versatile approach that, with careful management, allows us to rapidly achieve complex implementations. It is best represented in our RACI Matrix (Responsible, Accountable, Consulted, and Informed); however, the key aspects of our approach are:

- **Clear Roles and Responsibilities:** The Matrix Governance Model involves defining clear roles and responsibilities for both the central governing body and the project teams. The central body might be responsible for high-level strategic decisions, resource allocation, and overall project direction. The project teams would handle the day-to-day operational aspects of implementation.
- **Effective Communication Channels:** Communication channels are established to ensure efficient information flow between the central body and project teams. Regular meetings, reporting structures, and collaboration tools would facilitate communication and alignment.
- **Cross-Functional Collaboration:** The Matrix Governance Model encourages collaboration across different departments or functional areas. Project teams will consist of individuals with diverse skills and expertise relevant to the project's goals. This promotes innovative solutions and well-rounded decision-making.
- **Rapid Decision-Making:** Operational decisions can be made swiftly by project teams since they have the autonomy to address issues that arise during implementation. Strategic decisions that impact the entire project would involve input and approval from the central governing body, ensuring alignment with the project's overall objectives.
- **Flexibility and Adaptability:** The Matrix Governance Model allows for adaptability in response to changing project requirements or external factors. Project teams can quickly adjust their approach while the central body maintains a broader perspective on the project's strategic direction.

- **Conflict Resolution:** Since decision-making authority is shared, the Matrix Governance Model will include mechanisms for resolving conflicts or disagreements between project teams and within the central body. Clear escalation paths and guidelines for dispute resolution can help maintain harmony.
- **Performance Measurement:** Key performance indicators (KPIs) and metrics are be established to monitor the progress of both project teams and the overall project. Regular assessments help ensure that the project stays on track and meets its objectives.
- **Resource Allocation:** The central body allocates resources based on the project's needs and priorities. This ensures that resources are effectively distributed while avoiding potential resource conflicts within project teams.

[Redacted]

[Redacted]

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Roles and Definitions

Esri Canada

Name:	Title:	Defined Role:
<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>	<p>Managing Director of Assessment</p>	<ul style="list-style-type: none"> • Product direction and Owner • Assessment Subject Matter Expert
<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>	<p>Director, Assessment</p>	<ul style="list-style-type: none"> • Project Owner • “Product Conversion Manager” • Assessment Subject Matter Expert
<p>[REDACTED]</p>	<p>Professional Services Manager</p>	<ul style="list-style-type: none"> • Project Director • Oversees project management adherence to established practices. • Accountable for Project Delivery
<p>[REDACTED]</p>	<p>Industry and Product Manager</p>	<ul style="list-style-type: none"> • Product Manager • Assessment Subject Matter Expert • Person accountable for overall engineering and functional and design.
<p>[REDACTED]</p>	<p>Development Manager</p>	<ul style="list-style-type: none"> • Person accountable for overall architecture and development of the application
<p>[REDACTED]</p>	<p>Technology Solutions Manager</p>	<ul style="list-style-type: none"> • Oversees new research and development for the application.

		<ul style="list-style-type: none"> Accountable for the Data Architecture of AA GAMA
██████████	Project Manager	<ul style="list-style-type: none"> Management and administration of project plan, resources and deliverables Responsible for Project Delivery
██████████	Business Analyst	<ul style="list-style-type: none"> Works with the client and the development team to write up detailed requirements in the form of Features and User Stories.
██████████	Solution Architect	<ul style="list-style-type: none"> Technical Lead for the project
██████████	UI/UX	<ul style="list-style-type: none"> Designs and implements UI/UX
██████████	QA Test Lead	<ul style="list-style-type: none"> Leads and implements the testing of each Sprint and Release to ensure functionality exists and works as per the defined User Story
████████████████████	Configuration Support	<ul style="list-style-type: none"> Assists in the configuration of the application per each Sprint and Release to ensure functionality meets the requirement statements defined
██████████████████	QA Test Lead Support	<ul style="list-style-type: none"> Assist in implementing the testing of each Sprint and Release to ensure functionality exists and works as per the defined User Story

[REDACTED]	Training Support	<ul style="list-style-type: none"> Assist design and delivery of training material
[REDACTED]	Product Development Support	<ul style="list-style-type: none"> Assist development of functionality in each sprint per the defined User Story
[REDACTED]	Data Migration Support	<ul style="list-style-type: none"> Assist migration of data from client and 3rd party systems to GAMA Analysis of data for client data cleansing activities

TAD:

Title:	Defined Role:
Project Owner	<ul style="list-style-type: none"> Project Owner Contact Owner
Project Director	<ul style="list-style-type: none"> Project Director Oversees project management adherence to established practices. Accountable for Project Delivery
Project Manager	<ul style="list-style-type: none"> Management and administration of project plan, resources, and deliverables Responsible for Project Delivery
SME's	<ul style="list-style-type: none"> Provide industry and business-specific knowledge and content Works intimately with Business Analysts to capture requirements. Approves Requirement Statements and Acceptance criteria Tests functionality
Business Analyst	<ul style="list-style-type: none"> Works with the business SMEs to populate Business Requirement Analysis Documents. Liaison with ESRI Canada PM and Business Analyst to ensure all aspects of the requirements are captured and requirements statements and acceptance criteria are approved.
QA Test Lead	<ul style="list-style-type: none"> Leads and implements the testing of each Sprint and Release to ensure functionality exists and works as per the defined acceptance criteria. Works with the SME testers to administer a structured testing plan

Data Migration Support	<ul style="list-style-type: none"> • Assist migration of data from client sources and 3rd party systems to GAMA • Data cleansing activities • Data Mapping activities • Data Validation activities
------------------------	---

Project Documentation

Esri Canada agrees to furnish all requisite documentation (as defined below) that is essential for facilitating governance approval processes, orchestrating a successful Go-Live, and ensuring timely status updates throughout the project lifecycle. We recognize the pivotal role of comprehensive documentation in ensuring transparent communication, informed decision-making, and project success.

Our commitment extends to delivering meticulous documentation that encompasses:

1. Project Management Schedule(s)
 - Project Implementation Schedule
 - Release Schedule
 - Milestones/Invoicing Schedule
2. Project Charter
 - Project Team & Governance Structure
 - Project Constraints & Dependencies
 - Completion Criteria
 - Success Criteria
 - RACI
3. Project Management Artifacts
 - RTM
 - RAID Log
 - Data Migration Plan
 - Business Analysis Plan
 - Testing Plan
 - Training Plan
4. Technical Documentation:
 - Architectural/Security Diagram
 - Penetration/Vulnerability Testing Report
5. Configuration Documentation
 - Release Notes
 - Defect Log
 - Functional Test Plans
6. Data Documentation:

- Data Dictionary
- Data Mapping
- Data Validation Reports

7. Meetings

- Weekly Project meeting minutes
- Project Leadership Team Progress Presentation & Report

8. Training

- AA GAMA - Evaluator COTS Admin Manual Creation
- AA GAMA - Evaluator COTS User Manual Creation
- AA GAMA - Evaluator COTS Train-the-Trainer Course

Our commitment to providing comprehensive documentation is unwavering. By doing so, we seek to foster a collaborative partnership, instill confidence in project oversight, and ensure the project's alignment with the highest standards of governance, successful Go-Live, and ongoing success.

Project Collaboration

Indicative of our extensive experience with public sector solution implementations, Esri Canada has firmly established a track record of successful engagements across diverse projects. Our expertise is underscored by our involvement in a multitude of projects, each marked by their unique demands and requirements.

In alignment with the TAD's objectives, we will seamlessly collaborate on comprehensive project planning, project status reporting, steering committees, and governance reporting. This approach will foster a unified vision and transparent communication channels, ensuring that project milestones are attained in accordance with defined benchmarks.

Resource management and risk management, two critical aspects of project success, will be adeptly navigated through our approach. Our strategies will encompass resource allocation and optimization, guaranteeing efficient utilization while mitigating potential risks through meticulous planning and proactive mitigation measures. In the event that issues necessitate escalation, our established protocols will ensure prompt identification, resolution, and stakeholder communication.

Esri Canada's exceptional capabilities in GIS technology and project management will lend themselves seamlessly to supporting TAD's objectives. Our unparalleled ability to provide a panoramic view of the customer's journey will remain a unique facet of our approach. As an Esri distributor, our perspective will extend beyond the implementation phase, encompassing consulting, training, technical support, and customer care. This 360-degree engagement strategy will empower our consulting personnel with a comprehensive understanding of our customers' evolving needs across their organization, harmonizing seamlessly with the adoption of solutions like AA GAMA.

The Esri Canada's Assessment Team is committed exclusively to Assessment Analyst implementations, the team brings a wealth of expertise. Notably, they possess an intricate understanding of GIS and Assessment applications, harnessing best practices to address complex assessment management needs. With an arsenal of tailored tools and

methodologies, our team will ensure that we can collaboratively work and guide the client so that the AA GAMA implementation aligns perfectly with assessment management protocols, yielding high value.

The essence of our approach will be exemplified in the phases of an AA GAMA project. From initial consultation to project completion, our team members will collaborate with the client in cross-functional teams, ensuring the continuous alignment of deliverables with project managers' oversight. This mechanism will reinforce effective communication and ensure that deliverables align with project objectives.

Esri Canada's Assessment Advisory Board, an assembly of senior industry experts, is an integral component of our industry alignment methodology. This review board will critically evaluate solution designs from multiple technical angles, ensuring they adhere to prevailing best practices while remaining adaptable to customer needs. This Advisory Board will extend to the TAD Mass Appraisal AA GAMA - Evaluator solution, guaranteeing its industry resilience.

Our experience in local government solution implementations will be demonstrated through a seamless partnership approach, a specialized Assessment Team, rigorous project methodologies, and a robust support ecosystem. Esri Canada will be unequivocally positioned to support TAD's mandate with AA GAMA - Evaluator, delivering exceptional value and enduring success.

Software/Hardware Maintenance

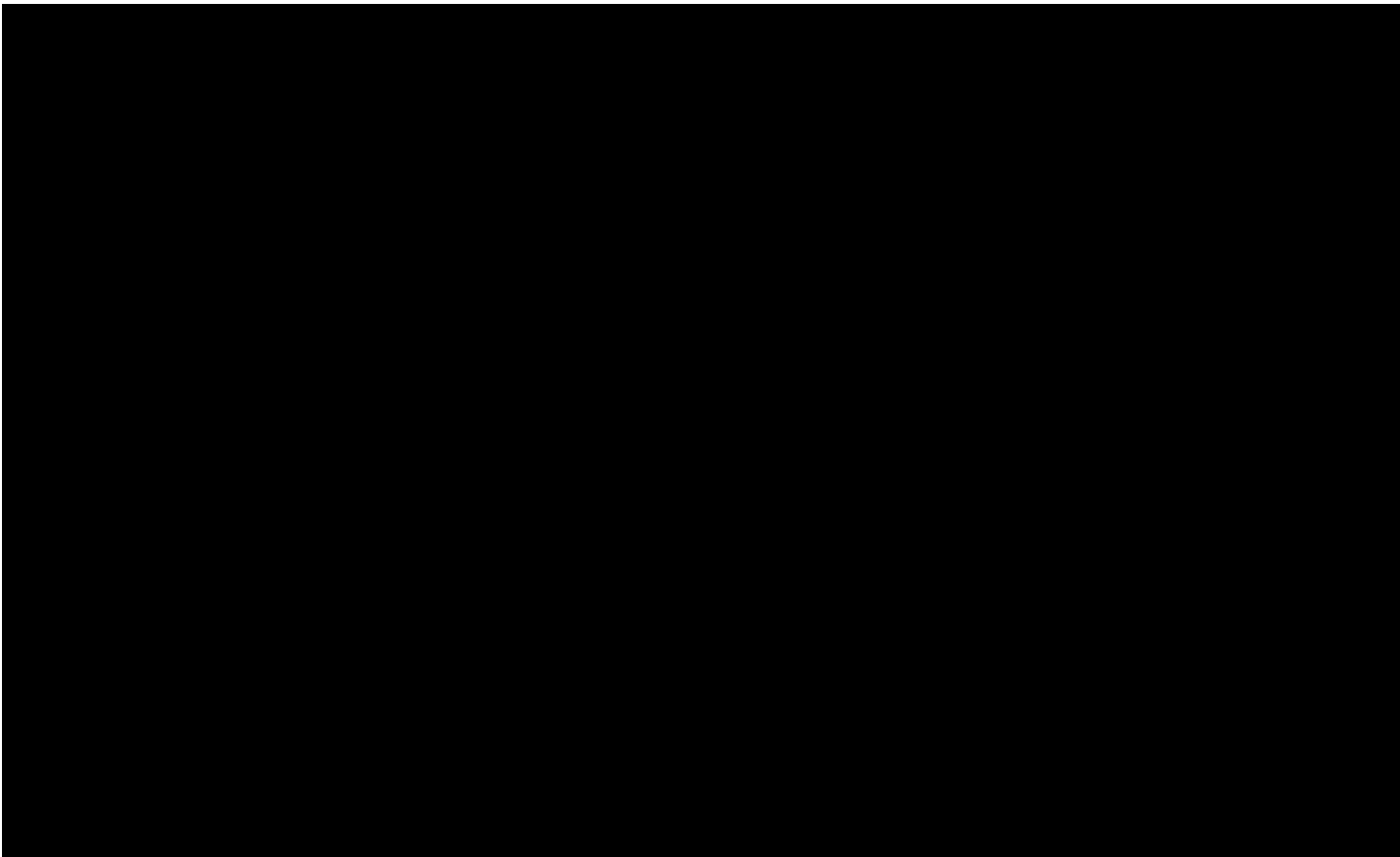
Esri Canada has provided a sample software maintenance agreement within the "Procurement Agreement" in Section 20 of this proposal.

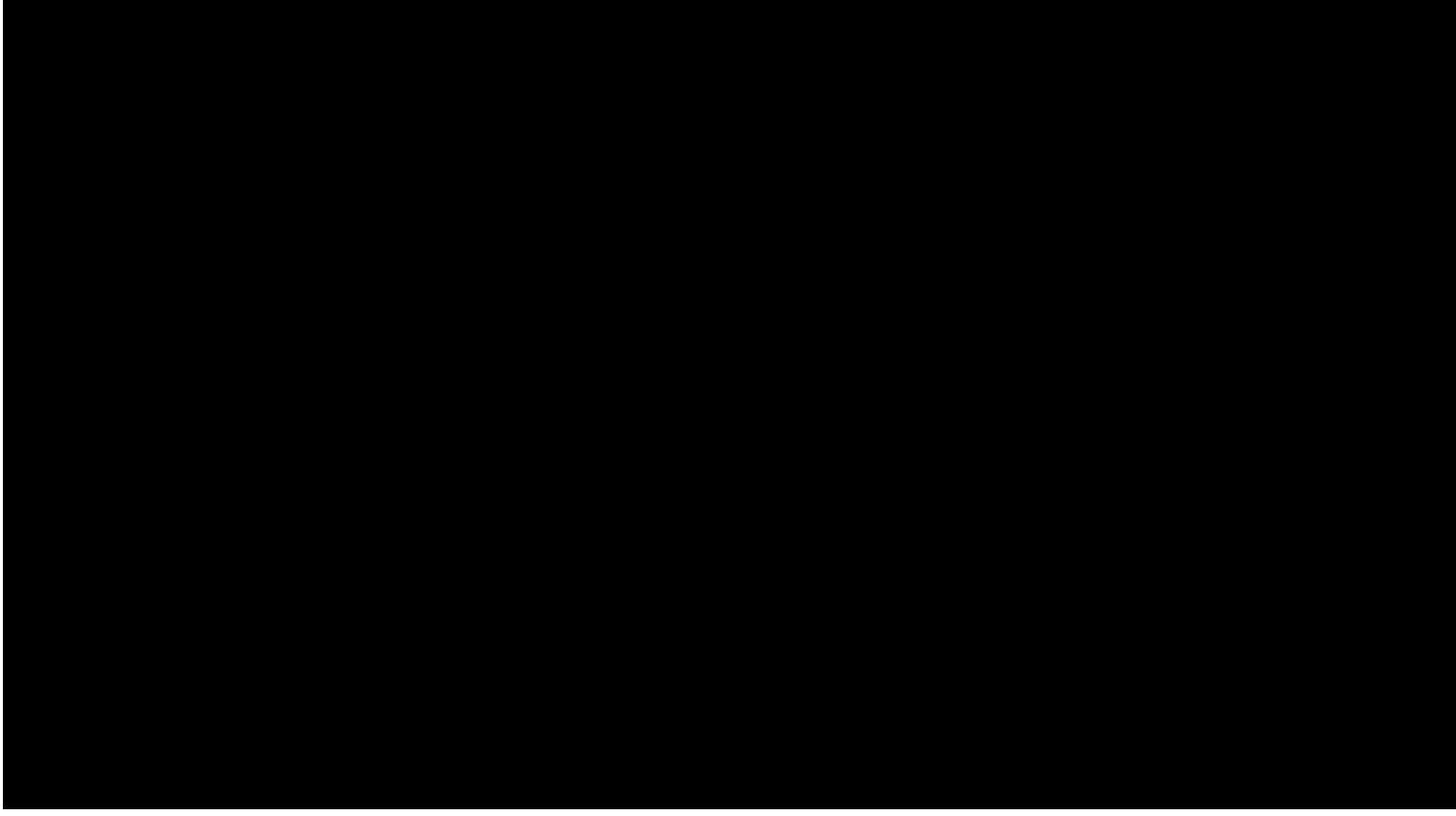
GIS Mapping System

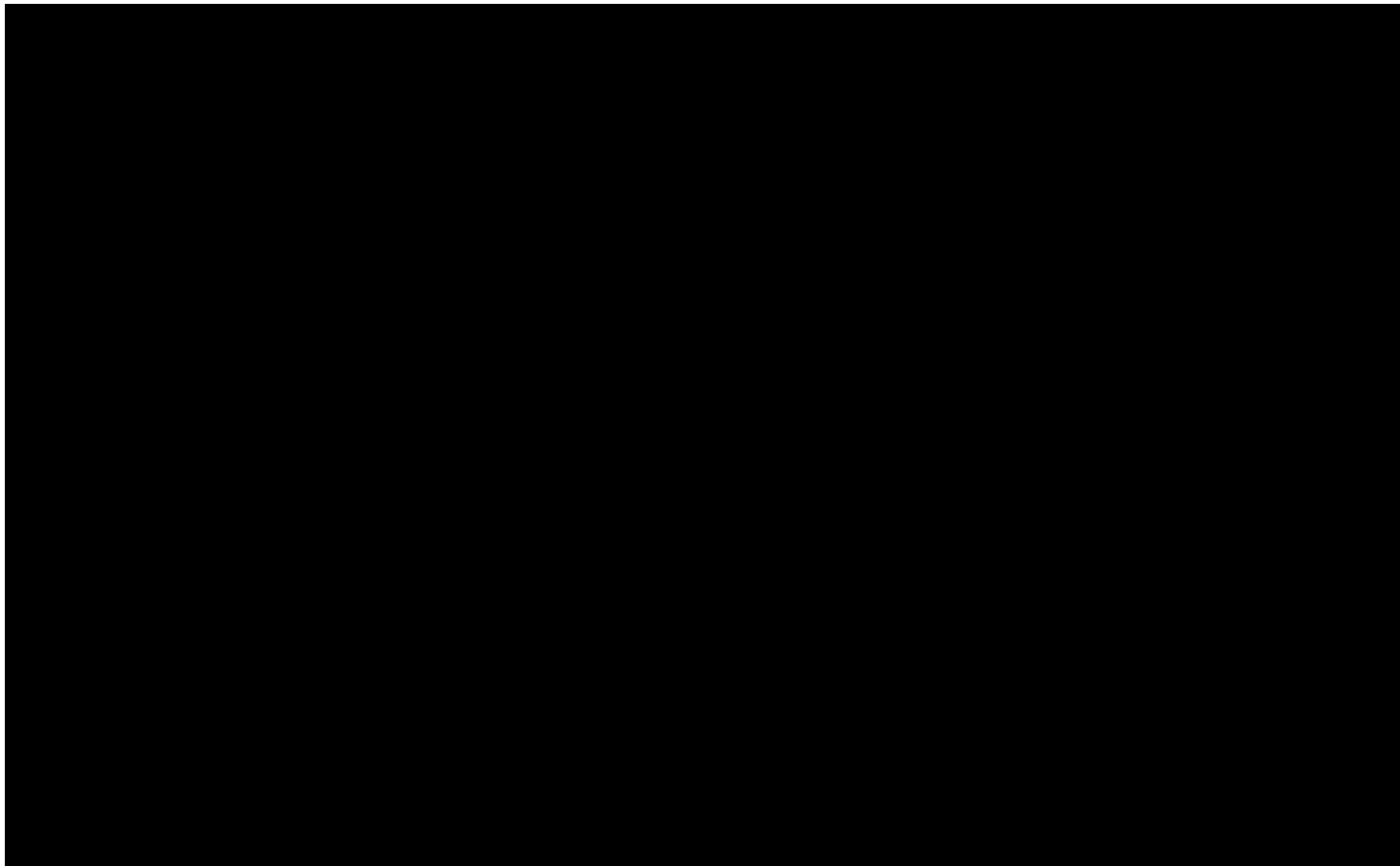
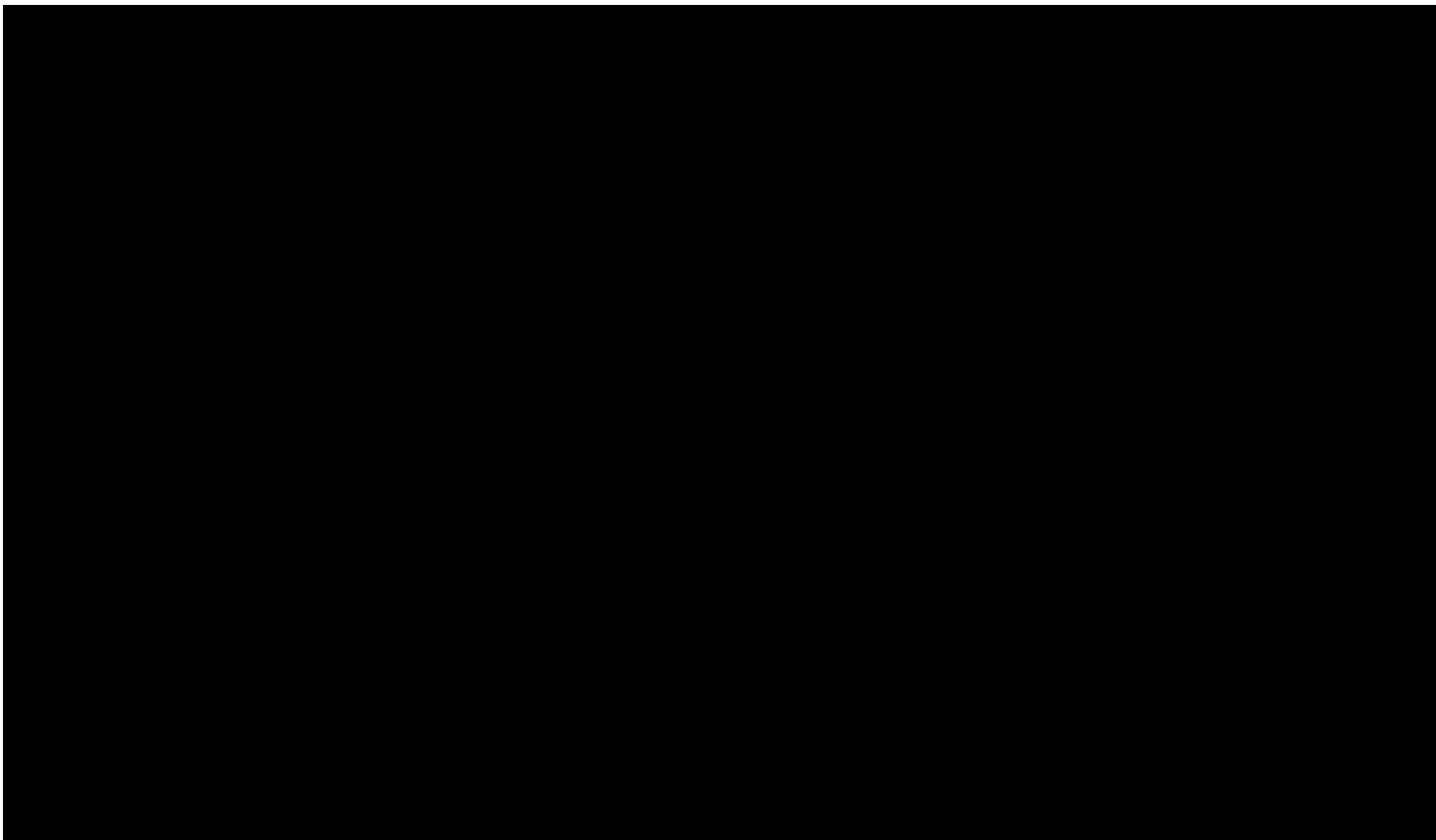
Our AA GAMA - Evaluator solution is not just connected to a GIS – it is driven by GIS. AA GAMA - Evaluator fully integrates GIS with traditional CAMA functions, providing you with a single platform to perform a wide variety of activities without the need to transfer data between systems, subsystems, or viewers. AA GAMA - Evaluator's GIS-centric workflow, and enhanced CAMA functions and workflows offer a superior process to access, visualize, modify, and update property assessment data, thus leading to improved management and increased efficiency. The GIS capabilities add critical value providing assessors with a comprehensive solution for fair and accurate property assessment, timely access to ownership, assessment, and map data.

The AA GAMA - Evaluator solution will enable the tax assessment/ mass appraisal functions of TAD to leverage spatial data in its valuation model. AA GAMA - Evaluator uses Esri's standard ArcGIS file format i.e. feature services and webmaps to visualize the geospatial information on the Webmap included in the interface. This webmap is built by using the feature services exposed from the AA GAMA - Evaluator database and other geo-spatial datasets. Any other customer published feature service and webmaps can also be added to the AA GAMA - Evaluator interface's webmap by using "Add Data" widget. The feature service published from the AA GAMA - Evaluator database can also be consumed in other Esri's applications like Field Maps, AGOL etc.

Currently Maricopa County, Greenville County, Service New Brunswick (Province of New Brunswick) use AA GAMA-Evaluator's GIS enabled interface for their daily assessment work. Following is high level GIS solution architecture for AA GAMA.







Cost Estimator Integration

Esri Canada understands that TAD requires the ability to integrate with construction cost estimators for residential and commercial properties. The AA GAMA – Evaluator offers seamless integration with the online costing estimator provided by Core Logic, known as the Marshall and Swift Valuation Platform Online (MSVPO). This integration allows TAD to input data for both residential and commercial properties, which is then sent to MSVPO for valuation using their online cost tables. Based on these cost tables, a valuation is returned to AA GAMA - Evaluator, where it can be used to determine the Net Assessed Value.

[REDACTED]

- [REDACTED]
- [REDACTED]

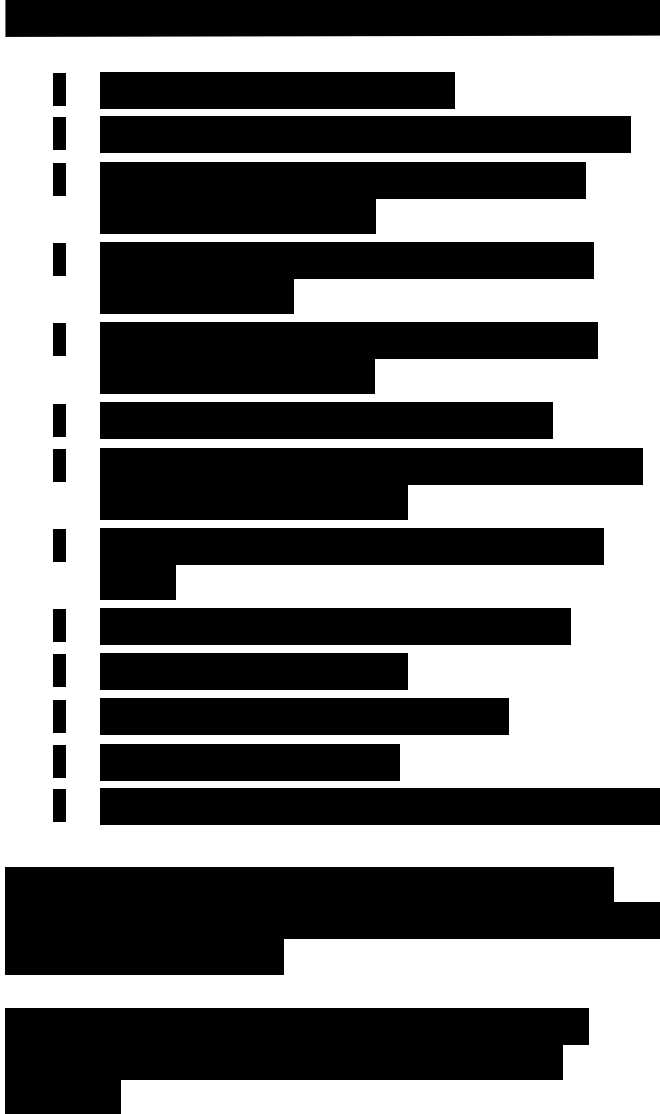
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14. Project Assumptions

[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
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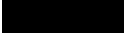


15. Cost

Overall Cost	
Cost for delivery of Mass Appraisal System the scope and timeframes of which are described in sections 13 and 16, with capabilities defined within the Requirements tables in Section 18 below.	

Notes on Costs:

Cost of One time Implementation (aka: configuration & installment of system)

- As noted in table above, all implementation services for all requirements noted within the RFP are included in the cost of implementation at 

Cost of AA GAMA Evaluator Product

- Application costs including hosting in Microsoft Azure (Cloud) for 10 years of data are noted within the pricing table. This price is predicated on a 5-year term for Subscription licensing and is [REDACTED]
- AA-GAMA Evaluator is priced with up to [REDACTED]
- [REDACTED]

Cost of Conversion

- All costs for 10 years of data migration including data transformations, data loading including building sketch files are included in the implementation costs quoted herein.
- Included in the price is MS Azure hosting of the 10 years of data.

Cost of Training

- All training costs for staff are included within the implementation cost. This includes on-site training for staff and administrative users.

Cost of Expansion Capabilities of Hardware

- As AA GAMA - Evaluator is a hosted SaaS solution, there are no additional hardware costs due to expansion. Our contract with Microsoft Azure allows scaling to increase performance if needed at critical event times. This is seamless to the user and requires no additional cost.

Cost of Facility Modifications

- No additional costs for facility modifications as AA GAMA - Evaluator is a Cloud Hosted SaaS application and as such not resident on TAD premises.

Cost of Third-party Software Components

- See assumptions below. Standard industry terms require that third-party components of the proposed solution are procured and licensed directly with TAD and the license is added to AA – GAMA Evaluator through Administrator privileges thereby expanding the functionalities of AA – GAMA Evaluator. [REDACTED]

16. Legal and Contractual Issues

Esri Canada has provided in this proposal two standard sample contracts:

- 1.) A procurement contract for supply of the Assessment Analyst GAMA - Evaluator COTS product, and the related professional services and maintenance and support (“Procurement Agreement”) is found in Section 20.
- 2.) An Assessment Analyst COTS product License Agreement (“License Agreement”) is found in Section 21.

In the context of these contracts, our answers to the key contract issue questions and statements are as follows:

Terms of Payment

Payment terms are set out under Section 2.0 on pages 1 and 2 of the “Procurement Agreement”. As per Section 2.9 on page 2 of that document, to the extent permitted by applicable law, [REDACTED]

Esri Canada utilizes an Agile delivery methodology to implement AA GAMA - Evaluator. In the table below, the Agile implementation services payment milestones are divided by work event, and deliverables with costs.

Note that the proposed project delivery plan is predicated on an August 2024 – August 2025 timeframe.

One Time Services

Milestone Name	End Date	Deliverables	Price USD
Milestone 1: Project Setup and Initial Data Analysis	Sept, 18, 2024	[REDACTED]	[REDACTED]
Milestone 2: Configuration Period 1	Oct 11, 2024	[REDACTED]	[REDACTED]
Milestone 3: Configuration Period 2	Nov 18, 2024	[REDACTED]	[REDACTED]

Milestone Name	End Date	Deliverables	Price USD
		• [REDACTED]	
Milestone 4: Configuration Period 3	Jan 8, 2025	• [REDACTED] [REDACTED] [REDACTED]	[REDACTED]
Milestone 5: Configuration Period 4	Feb 10, 2025	• [REDACTED] [REDACTED] [REDACTED]	[REDACTED]
Milestone 6: Configuration Period 5	Mar 24, 2025	• [REDACTED] [REDACTED] [REDACTED]	[REDACTED]
Milestone 7: Configuration Period 6	May 5, 2025	• [REDACTED] [REDACTED] [REDACTED]	[REDACTED]
Milestone 8: Train- the-Trainer & UAT	Jul 14, 2025	• [REDACTED] [REDACTED]	[REDACTED]
Milestone 9: Cutover	Aug 29, 2025	• [REDACTED] [REDACTED]	[REDACTED]
Total			[REDACTED]

Subscription

Term	Term Start	Term End	Price USD
AA GAMA Evaluator - License Year 1	August 1, 2024	July 31, 2025	[REDACTED]
AA GAMA Evaluator - License Year 2	August 1, 2025	July 31, 2026	[REDACTED]
AA GAMA Evaluator - License Year 3	August 1, 2026	July 31, 2027	[REDACTED]

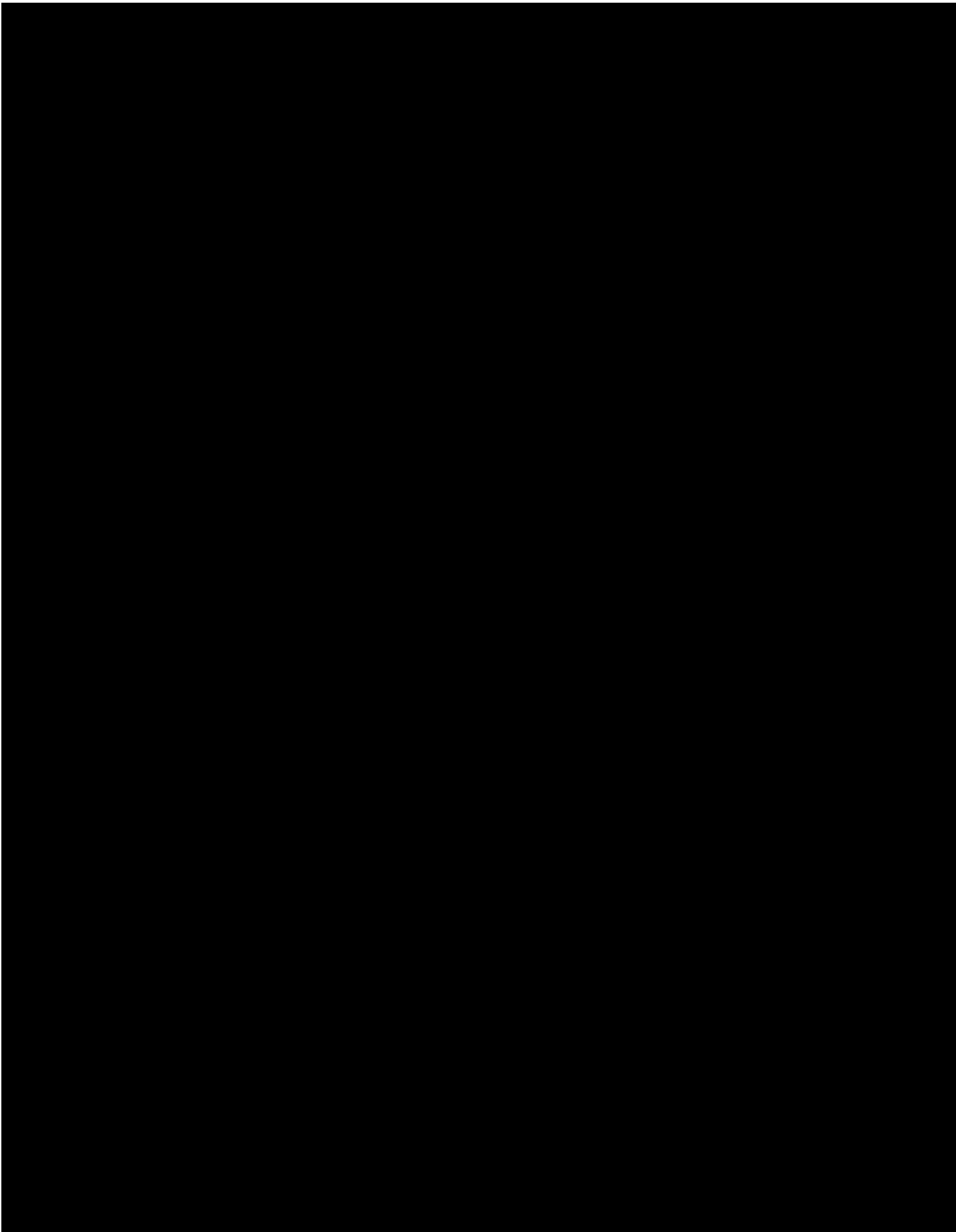
AA GAMA Evaluator - License Year 4	August 1, 2027	July 31, 2028	████████
AA GAMA Evaluator - License Year 5	August 1, 2028	July 31, 2029	████████

Section 2.8 on page 2 of the “Procurement Agreement”, addresses our suggested resolution for disputed invoices. Please note that in addition, it is our company practice to initiate a Project Steering Committee with our customers. The Steering Committee can also be used as a dispute mechanism if required.

Delivery

As a SAAS product there is no delivery/installation of onsite equipment. All clients are setup to use the system within a unique instance within our multi-tenant cloud-based environment and log in credentials via Active Directory.

Key delivery points, 9 Milestones, are described in the table above. A more detailed project task delivery work plan with Agile milestones, durations and team responsibilities are presented in the table below. An even more detailed rendition of the proposed tasks and deliverables in the work plan is provided in Section 19 of this proposal.



Acceptance

Esri Canada utilizes a robust Business Analysis and Quality Assurance process that focuses on thorough acceptance practices. Our acceptance methodology starts with the contract requirements and the proposal response where we define our capabilities as accurately as possible. After the contract is executed, we refine these requirements into requirement statements with associated acceptance criteria. This is accomplished through our Business Requirement Analysis Document (BRAD). Once a BRAD is complete Esri Canada will request acceptance of the document so that we may begin application configuration. Through our Agile workflow refinements are possible throughout implementation. The goal is that we try to avoid any fundamental changes in our understanding or approach.

The requirements defined in the BRAD are configured and tested by Esri Canada, then deployed to the customer's UAT environment. TAD will perform Functional Testing immediately after deployment and provides acceptance or defects as they relate to the acceptance criteria defined in the BRAD. This is preformed iteratively over the course of implementation until the User Acceptance Testing period.

TAD will compile all functional testing scripts into end-to-end business sequences and will iteratively perform UAT over UAT rounds until Acceptance per acceptance criteria defined in the BRAD is received. Acceptance shall be provided in any testing cycle provided that no Severity 1 or 2 defects are present.

Esri Canada has included a description of the acceptance process for our services output deliverables in Subsection 3 of Exhibit E of the "Procurement Agreement" (page 20).

Assignment, Use and Resale

Please refer to the "Procurement Agreement" in Section 20 of this proposal. It provides under subsection 6.26 (page 8 of that contract) that the contract cannot be assigned by either party without the prior written permission of the other contracting party.

Please also refer to the "License Agreement" in Section 21 of this proposal. It provides under Article 9.6 (page 7 of that contract) that the customer licensee is not permitted to assign its rights under the license agreement without Esri Canada's prior written consent.

Termination

The sample "Procurement Agreement" attached under Section 20 of this proposal includes the following termination provisions:


- Subsection 6.7 (page 4) which includes terms with respect to termination of the Procurement Agreement for the customer's convenience.
- Subsection 6.8 (pages 4 and 5) which contains a mutual termination for cause provision.

Article 5 (page 5) of the sample "License Agreement" attached under Section 21 of this proposal includes the parties termination rights. Pursuant to this Article 5:

- the customer licensee is permitted to terminate the License Agreement or a Licensed Product license at any time upon written notice to Esri Canada, provided however, there will be no refund of fees paid to Esri Canada in the event of any such termination for customer licensee's convenience.

- each party is entitled to terminate the License Agreement or any Licensed Product license for material breach.

Execution Authority and Legal Assistance


Vice President and General Manager
Esri Canada Limited

Product Warranty

The sample “Procurement Agreement” attached under Section 20 of this proposal presents the warranty provisions for services output deliverables under Section 7, Warranties and Disclaimers (Page 22).

Article 6 (page 4), Limited Warranties and Disclaimers, of the sample “License Agreement” attached under Section 21 of this proposal includes the warranty provisions for the AA GAMA – Evaluator.

17. Product Information

Assessment Analyst® GAMA binds the power of CAMA and GIS, allowing you to combine spatial data with advanced analysis, resulting in quicker, more equitable, and defensible valuations. AA GAMA is a multi-tenant, cloud hosted, SaaS solution designed and built for large, complex organizations with substantial parcel counts, intricate taxation requirements, and business process-oriented operations. It features a modern user interface that leverages the best available information, ensuring a seamless and efficient user experience.

Built on the Esri platform, AA GAMA benefits from all the advancements Esri Inc. makes in GIS technology. This includes strides in Artificial Intelligence, Data Management, Stakeholder Engagement, and Advanced Analytics, allowing AA GAMA to integrate these cutting-edge enhancements into its product. Regular updates and a well-maintained product roadmap, guided by the Assessment Analyst Advisory Board, ensure that AA GAMA stays at the forefront of industry standards and evolving GIS requirements, continually advancing to meet the dynamic needs of the appraisal industry.

AA GAMA empowers users with its highly configurable application, tailored to meet specific business requirements. This ensures the application adapts to the user, rather than the user adapting to the application. From configurable workflows that encompass all business processes to integration with SQL Server Reporting Services (SSRS) for comprehensive reporting and letter processing, AA GAMA provides a robust and versatile toolset.

AA GAMA is an ideal match for TAD, promising to exceed team expectations and enhance daily operations' efficiency. By leveraging the world-leading GIS capabilities of Esri, AA GAMA propels TAD into the future, capitalizing on the importance of location in real estate to deliver superior CAMA solutions.

AA GAMA is a comprehensive property assessment solution with three license models: AA GAMA - Explorer for powerful property data visualization, AA GAMA - Editor for advanced data management and real-time editing, and AA GAMA - Evaluator, which combines CAMA and GIS for robust property assessments. AA GAMA - Explorer allows users to visualize data on interactive maps, while AA GAMA - Editor enhances data accuracy with seamless map-based editing. AA GAMA - Evaluator integrates all features, offering flexible valuation approaches and a configurable workflow engine. Together, these tools ensure efficient, accurate, and equitable property valuations.

A more detailed description of each subscription is below:

AA GAMA - Explorer: Your Ultimate Property Data Visualization Tool

Unlock the power of spatial data visualization with AA GAMA - Explorer. Seamlessly visualize your property data on interactive maps, gaining invaluable insights into your market areas and property characteristics like never before. With AA GAMA - Explorer, you can effortlessly identify data patterns, anomalies, and valuation trends, empowering you to make informed decisions to maintain the highest data quality and equitable property valuations.

Key Features:

- **Spatial Visualization:** Gain a comprehensive understanding of your property data by visualizing critical assessment-related information directly on interactive maps. Explore total assessed value, sale ratios, property characteristics, and more with ease.

- **Market Area Insights:** Dive deep into your market areas with assessment-related statistics, including mean value, sale rate, site coverage ratios, sale price per square foot, and analyze sold vs unsold price per square foot. Uncover valuable insights to drive strategic decision-making.
- **Configurable GIS Layers:** Enhance your analysis by adding and displaying additional GIS layers within the application. Pairing those additional layers with the pre-populated data insights enhances your property analysis.
- **Effortless Sharing:** Bookmark your analyses or share or print information directly from the application, making it easy to share insights within your office or with external clients. Collaborate seamlessly and drive actionable outcomes.

AA GAMA - Explorer revolutionizes the way you explore and analyze property data, offering unparalleled insights to ensure you are reviewing and maintaining fair and equitable property valuations.

AA GAMA - Editor: Your Comprehensive Property Data Management Solution

Elevate your data management capabilities with AA GAMA - Editor, a powerful tool that combines the visualization features of AA GAMA - Explorer with advanced editing functionalities. Seamlessly update or modify property data, whether it's for an individual property or in bulk, directly on the map interface. With AA GAMA - Editor, you can ensure data accuracy and integrity with unparalleled ease and efficiency.

Key Features:

- **Real-time Data Editing:** Correct core data discrepancies or update property characteristics directly on the map interface and instantly visualize the changes. These changes can occur on a variety of different data elements to ensure that you have data consistency and accuracy to assist with equitable property valuations.
- **Sketch in a GIS Environment:** Experience seamless property sketch management by sketching in a GIS Environment, enabling you to update, maintain, and correct core data items within a GIS framework. Geo-reference your sketches against ortho imagery for unparalleled precision, while generating interoperable feature layers for easy sharing both internally and externally.
- **Seamless Integration:** Integrate with various imagery sources, including street front and oblique imagery, for a comprehensive property data review. Experience enhanced efficiency in conducting full property reassessments without leaving your desk.
- **External Data Integration:** Bring in additional data sources from external providers and seamlessly incorporate them into the application for a more comprehensive analysis. Access a wealth of information to enrich your data insights.

With AA GAMA - Editor, you can seamlessly visualize and correct your property data in ways never before possible. With the ability to edit an individual property or edit in bulk, you will be able to make all the changes directly on the map and instantly review those changes.

AA GAMA - Evaluator: Binds the power of CAMA and GIS for your property assessment solution Unlock the full potential of your property assessment processes with AA GAMA - Evaluator, which combines the features of a CAMA system with GIS to create a Geographic Assisted Mass Appraisal (GAMA) assessment solution. Combining the features of AA GAMA - Explorer and AA GAMA - Editor, AA GAMA - Evaluator revolutionizes property assessment by

offering enhanced GIS-based functionalities for the entire assessment lifecycle.

Key Features:

- **GIS-Centric Application:** Experience the power of GIS-driven property assessment with AA GAMA - Evaluator. Perform complex searches that seamlessly combine spatial and non-spatial data, delivering faster and more accurate results for informed decision-making.
- **Flexible Valuation Approaches:** Utilize all valuation approaches within the application, including the ability to upload valuation models built in third-party software. Empower your assessment processes with versatile valuation methodologies tailored to your specific needs.
- **Configurable Workflow Engine:** AA GAMA - Evaluator boasts a robust and configurable workflow engine, allowing users to build and adapt business processes within the application effortlessly. Stay agile and responsive to evolving requirements without vendor involvement.
- **Comprehensive Assessment Solution:** From tracking ownership transfers to managing exemptions, AA GAMA - Evaluator handles all your assessment needs seamlessly. Calculate net assessed values with precision and efficiency, ready for integration into any property tax software solution.
- **Data Integrity:** Benefit from a customizable data integrity feature in AA GAMA - Evaluator, empowering users to set up personalized data entry rules for accurate and consistent data input. By leveraging the data review capabilities of AA GAMA - Explorer and AA GAMA - Editor, AA GAMA - Evaluator prevents data issues at the source, ensuring data integrity and reliability for your assessments.

AA GAMA - Evaluator propels your property assessment solution into the future, leveraging the power of GIS for unparalleled efficiency and accuracy. Ability to use all the features included in AA GAMA - Explorer and AA GAMA - Editor, AA GAMA - Evaluator will give you the power to create your next assessment roll within a rich GIS environment.

18. Requirements Tables

VI.GENERAL SOFTWARE DESIGN

AA – GAMA Evaluator RESPONSE NOTE (for explanatory purposes):

- We have answered YES where the functionality is resident in the system or can be configured to meet the requirement.
- We have answered NO to some questions where the expected answer would be assumed to be NO, For example: Has a client experienced the total loss of access and/or visibility to an account(s)? (Example: No primary accounts) Response: NO
- We have answered NO to some questions [REDACTED]
- We have answered NO to some questions [REDACTED]

1. Application Design	Yes	No	Cost to Modify
1.1. Does the vendor, within current maintenance costs, ensure legislative compliance by the bill effective date or as soon as possible allowed by the release schedule?.	Yes		
1.2. Is the application cloud based?	Yes		
1.3. Is the application written for a dynamically scaled computing environment?	Yes		
1.4. Does the application support distributed processing server technology?	Yes		
1.5. Does the application allow for a fully redundant Windows & SQL Clustering solution to minimize downtime?	Yes		
1.6. Is the application developed for a Windows-based network environment?	Yes		
1.7. Does the application employ a Graphical User Interface for ease of use?	Yes		
1.8. Does the application have online help? If so...	Yes		
1.8.1. Is the help context-sensitive?	Yes		
1.8.2. Does it use the standard windows “What’s This?” functionality?	Yes		
1.8.3. Are there additional tools to allow direct contact with the support staff?	Yes		
1.8.4. Does the application have step by step “How To’s” developed for common functions?	Yes		
1.8.5. Does the application have step by step “How To’s” developed for Texas tax calendar functions?	Yes		
1.8.6. Is the online help updated when functionality is added or changed?	Yes		
1.8.7. Does the system allow for TAD-specific procedures to be added to the online help?	Yes		
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?	Yes		
1.10. Can the data be exported using industry standard formats?			
1.11. Is the application installed using standard methods in their respective platforms?	Yes		
1.12. Does the vendor utilize a structured Release Deployment Plan in order to schedule	Yes		
	Yes		

deployment and protect the end users from instability?	Yes		
1.13. Are new releases automatic?			
1.14. Is the application fully compatible with most internet browsers?	Yes		
1.15. Does the application support a read-only or kiosk mode for use in the customer service lobby?	Yes		
1.16. Does the product support user API's?	Yes		
1.17. Does the product support VOIP phone system integration?		No	[REDACTED]
1.17.1. Does the integration allow for accounts to be grouped and searched by caller ID?		No	
		No	
1.18. Is the application capable of Optical Character Recognition (OCR)?			

Description of AA GAMA - Evaluator Functionality

RFP Item: 1

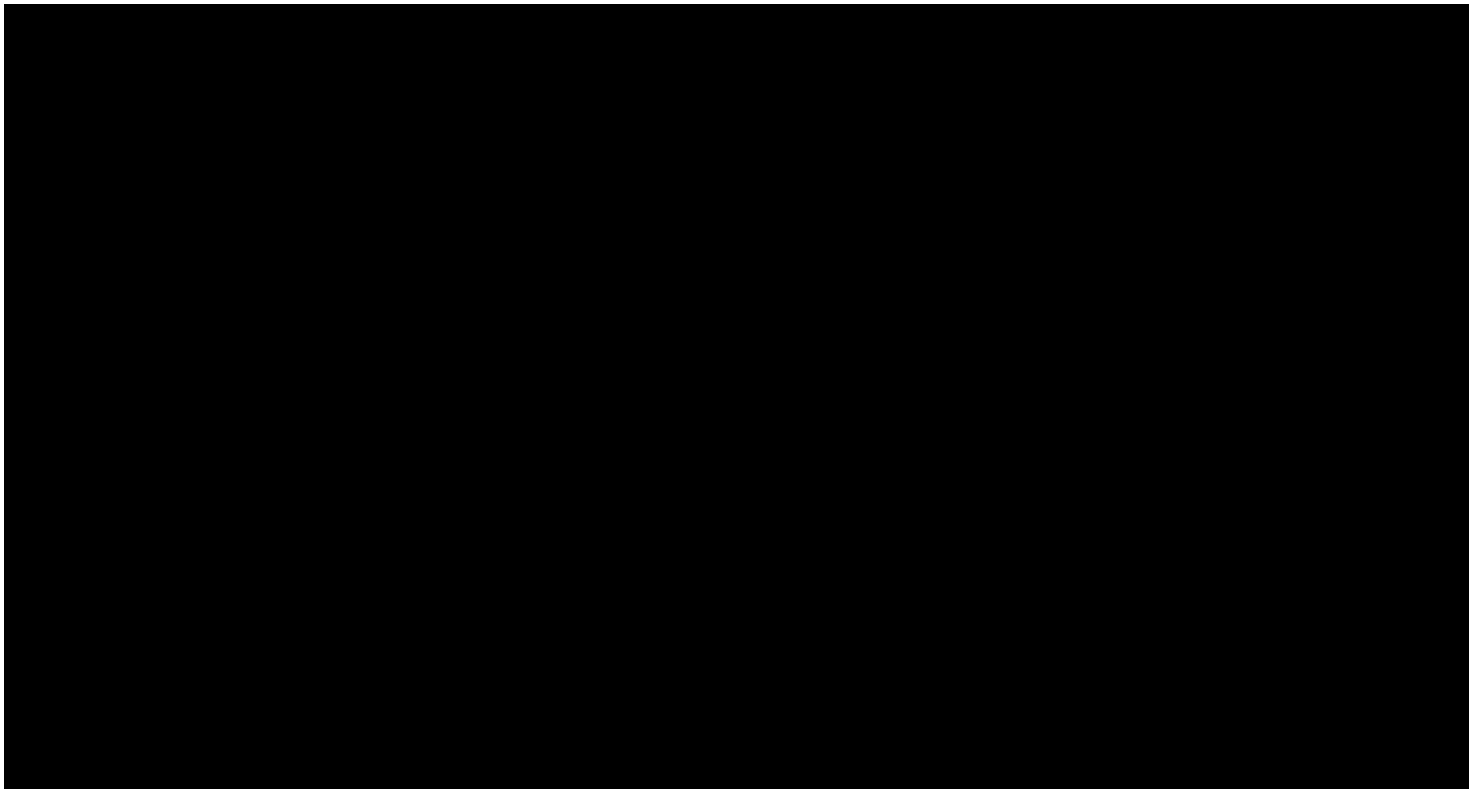
RFP Table Title: Application Design Capabilities & Advantages

Overall Description

Esri Canada's AA GAMA - Evaluator is a cloud-based SaaS product designed to be accessible, highly available, backup and recovery capable and highly scalable. It was built using iterative and responsive design process. The application stack is designed to be highly flexible, maintainable, and testable. [REDACTED]

[REDACTED]

[REDACTED]



AA GAMA - Evaluator Modular Approach

Key Items

- AA GAMA-Evaluator follows Modular Design for development flexibility and scalability for peak usage.
- AA GAMA-Evaluator application is highly configurable using customer specific configuration files that can be uploaded directly into application using AA Gama User Interface.
- AA GAMA has a built in Backup strategy/data replication and uses Microsoft's best practices for point in time backup.
- AA GAMA is designed on data encryption and uses private endpoints/IP whitelisting for secure integration.

█ [Redacted text block]

Summary

AA GAMA Evaluator is a secure assessment SAAS solution hosted on Azure Cloud, build for scalability, affordable for organizations that wish to avoid deploying, and managing large infrastructure and software.

2. Database Design	Yes	N o	Cost to Modify
2.1. Does the application maintain a one-to-many relationship between the owner table and the property/parcel table? (Can an owner have multiple properties?)	Yes		
2.2. 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?)	Yes		
2.3. Does the application allow for ownership % to be applied and maintained at the land, improvement and personal property segment level?	Yes		
2.4. Is the number of taxing entities allowed per account unlimited?	Yes		
2.5. Does the application allow for entity % to be applied at the property level? For example, a property is 50% inside city limits – and not have to split the account.	Yes		
2.6. Does the application allow for entity % to be applied and maintained at the land, improvement and personal property segment level?	Yes		
2.7. Does the application allow for grouping properties for the purpose of apportioning exemptions? (Can a MH property be grouped with the land property or properties to apply the HS exemption without combining the properties?)	Yes		
2.8. Does the application allow for grouping properties for the purpose of apportioning value (Income Valuation, Economic Units, Effective Acres, Special Appraisal Distribution)?	Yes		
2.9. Does the application allow for prorating exemptions?			
2.9.1. If so, does the property allow for multiple prorations on the same account in the same tax year?	Yes		
2.10. Does the application support storage of tax payment status from the tax office?	Yes		
2.11. Does the application maintain a complete set of appraisal history per tax year?	Yes		
2.11.1. Is this accomplished without intervention by technical support personnel?	Yes		
2.11.2. Does this include land and improvement detail appraisal information?	Yes		
2.11.3. Does this include pricing schedules by tax year?	Yes		
2.11.4. Does this also include neighborhood adjustments by tax year?	Yes		
2.11.5. Does this also include subdivision adjustments by tax year?	Yes		
2.11.6. Does this also include cost multipliers and local multipliers by tax year?	Yes		
2.11.7. Does the application allow for calculations of value to be performed on a previous year account?	Yes		
2.12. Does the application capture a complete set of appraisal information when a property is sold?	Yes		
2.12.1. If so, does this include land and improvement detail appraisal information?	Yes		
2.12.2. Can land and improvement detail information be modified without affecting current values?	Yes		
2.12.3. Does the application allow for configurable user warnings to manage data entry affecting new value, sales or ARB settlement offers?	Yes		
2.13. Does the application capture new value?	Yes		
2.14. Does the application capture new value as a result of construction completion?	Yes		
2.15. Does the application allow for calculations of value to be performed on appraisal information captured at the time of sale?	Yes		
2.16. Does the application allow property comparison and ratio calculations with the appraisal information captured at the time of sale, in addition to the current appraisal information?	Yes		
2.17. Is the database SQL-compliant? If so...	Yes		
2.17.1. Can it be accessed using generally available ODBC drivers?	Yes		
2.18. Can it access other SQL-compliant databases such as GIS servers?	Yes		
2.19. Is there a graphical user interface for querying the database(s)?	Yes		
2.20. Is the complete data-dictionary available for querying?	Yes		

2.49. Does the system track owner Not of Record?	Yes		
2.50. Does the system track qualifying Trust?	Yes		
2.51. Does the system track beneficiary Name(s)?	Yes		
2.52. Does the system track beneficiary Date of Birth?	Yes		
2.53. Does the system track cooperative Housing?	Yes		
2.54. Does the system track disability Start Date?	Yes		
2.55. Does the system track disability End Date?	Yes		
2.55.1. Does the system allow for an automatic action to be taken as of the end date?	Yes		
2.56. Does the system track veteran Disability Rating?	Yes		
2.57. Does the system track total and Permanent Disability?	Yes		
2.58. Does the system track participating Taxing Units?	Yes		
2.59. Does the system allow the user to enter future exemption start dates?	Yes		
2.60. Does the system allow the user to enter future exemption end dates?	Yes		
2.61. Can the system produce and track exemption estimates for the estimates roll within the production database?	Yes		
2.62. Does the system maintain an exemption or other value modifier change log?	Yes		
2.63. Does the system calculate and maintain appraised value limitations?	Yes		
2.64. Does the system calculate and maintain tax ceilings and freeze years?	Yes		
2.65. Does the system calculate and maintain tax ceiling transfer ratios?	Yes		
2.66. Does the system allow tax ceiling and freeze year participation to vary per taxing entity?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 2

RFP Table Title: Database Design Capabilities & Advantages

Overall Description

AA GAMA - Evaluator’s support for managing various data types ensures robust data management. It intelligently loads data to "characteristics" in challenging data cleansing scenarios, preventing data loss. Characteristics, unlike fixed table columns, offer unparalleled flexibility; system administrators can create customizable fields with any data type on-the-fly, empowering adaptability, and agility. AA GAMA - Evaluator excels in intricate percentage tracking at parcel and component levels, enabling precise monitoring of attributes like assessment class, tax ratios, and exemptions. Its system flexibility extends to managing complex workflows, effortlessly handling parcel splits or combinations while maintaining parent-child relationships, Additionally, support extends to exemption applications, seamlessly tracking organizational and personal exemption classes and percentages for parcels and personal properties, with or without workflow integration, ensuring efficient and compliant operations.

AA GAMA - Evaluator will meet the stipulated data security and privacy requirements including encryption with industry standard algorithms and cyphers, with encryption keys managed solely by TAD. Esri technology is already used widely in TAD, but we are always prepared to have the service security assessed according to TAD Application Security Testing standard (OWASP ASVS - Open Web Application Security Project Application Security Verification Standard).

AA GAMA - Evaluator will meet the data security and privacy requirements listed as follows:

- Provides multi-tenant controls for separating users and data, as stated above IAM section.

- Leverages Microsoft Azure SQL Transparent Data Encryption (TDE) in an Azure SQL database for encryption of all data at rest. [REDACTED]
- Built in Backup strategy/data replication and uses Microsoft’s best practices for point in time backup.
- Designed for data encryption and uses private endpoints/IP whitelisting for secure integration.
- [REDACTED]
- AA GAMA - Evaluator fields can be configured to be “redacted” for privileged information and/or “localized” into different field names to facilitate pseudonyms.
- [REDACTED]
- [REDACTED]
- [REDACTED]
- Microsoft Azure Services undergo regular independent third-party audits for ISO/IEC 27001 compliance. Moreover, to help customers deploy a core set of policies for any Azure-based architecture that must implement ISO/IEC 27001 controls, Azure has released the Azure Blueprint for ISO/IEC 27001. AA GAMA - Evaluator Resources covered by the Azure Policy.

¹ [Azure Defender for SQL](#)

² [Azure Key Vault](#)

³ [Transparent data encryption for SQL Database](#)

⁴ [Azure Data Encryption at rest](#)

⁵ [SQL vulnerability assessment](#)

⁶ [Azure Security Center](#)


- Microsoft Azure assessed for compliance with the ISO/IEC 27018 code of practice during regular ISO/IEC 27001 audits conducted by an independent third-party auditing firm. These documents demonstrate that Microsoft Azure in scope for the audit have incorporated ISO/IEC 27018 controls for the protection of PII.
- Azure provides a baseline configuration of solution databases. All services over HTTPS configured SSL/TLS certificate for secure connections. The solution meets security and privacy of Audit/log, direct access control, incident alert with detailed information, and remote access protection.

VII. APPRAISAL DISTRICT OPERATIONAL CAPABILITIES

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?	Yes		
3.1.2. Geographic Number?	Yes		
3.1.3. Account Type (Real, Personal, Mineral, Mobile Home, Auto)?	Yes		
3.1.4. Include deleted and reference properties?	Yes		
3.1.5. By Year?	Yes		
3.1.6. Situs?	Yes		
3.1.7. Abstract/Subdivision, Block, Lot?	Yes		
3.1.8. Neighborhood Code or Description?	Yes		
3.1.9. DBA?	Yes		
3.1.10. Map ID?	Yes		
3.1.11. Building Permit Number?	Yes		
3.1.12. Mineral Lease Number?	Yes		
3.1.13. Previous ownership?	Yes		
3.1.14. Business type (NAICS)?	Yes		
3.1.15. Dealer's license number?	Yes		
3.1.16. Aircraft tail number?	Yes		
3.1.17. Owner/Taxpayer ID?	Yes		
3.1.18. Owner/Taxpayer Name?	Yes		
3.1.19. Owner/Taxpayer First Name?	Yes		
3.1.20. Owner/Taxpayer Last Name?	Yes		
3.1.21. Owner/Taxpayer Mailing Address?	Yes		
3.1.22. Previous Taxpayer Name?	Yes		
3.1.23. Agent's ID?	Yes		
3.1.24. Agent's Name?	Yes		
3.1.25. Agent's First Name?	Yes		
3.1.26. Agent's Last Name?	Yes		
3.1.27. Agent's Mailing Address?	Yes		
3.1.28. Entity?	Yes		
3.1.29. GIS tools?	Yes		
3.1.30. Year Range?	Yes		
3.1.31. Street Number Range?	Yes		
3.1.32. Block Range?	Yes		
3.1.33. Lot Range?	Yes		
3.1.34. Any Previous Taxpayer Name?	Yes		
3.1.35. Exemption Start Date?	Yes		

3.1.36. Exemption End Date?	Yes		
3.1.37. Deed Instrument Number?	Yes		
3.1.38. Deed Instrument Number Range?	Yes		
3.1.39. Deed Date Range?	Yes		
3.1.40. Phone Number?	Yes		
3.1.41. Username?	Yes		
3.1.42. Entry Date Range?	Yes		
3.1.43. Department?	Yes		
3.1.44. Exemptions?	Yes		
3.1.45. Property Use?	Yes		
3.1.46. Zoning?			

3.1.47. Value Status? (for tracking the property through appraisal cycle)	Yes		
3.1.48. Field Assignment Group? (For mobile appraisal device)	Yes		
3.1.49. Building Permit #?	Yes		
3.1.50. UDI Properties?	Yes		
3.1.51. Deed Volume/Page/Number?	Yes		
3.1.52. Improvement Type?	Yes		
3.1.53. State Code?	Yes		
3.1.54. Map ID?	Yes		
3.1.55. SIC Code?	Yes		
3.1.56. Mobile home Serial, Title or HUD number?	Yes		
3.1.57. Deed Volume, Page of Number?	Yes		
3.1.58. Configurable Code for Grouping Properties? (Property Group Code)	Yes		
3.1.59. ANY COMBINATION OF THE ABOVE?	Yes		
3.2. Does the system also allow for a generic/universal search using one entry box?	Yes		
3.3. Does the system have an advanced search?	Yes		
3.4. Does the system allow the use of wildcards (% , *) in the search criteria?	Yes		
3.5. Do all search results display basic data fields, including account number, situs, owner name, account status?	Yes		
3.6. Can displayed result fields be sorted, rearranged, added, or removed according to the user's preferences?	Yes		
3.7. Does the system display a message if no results are found?	Yes		
3.8. Does the system display the number of results found and the time taken to return the search results?	Yes		
3.9. Does the system have an adjustable limit for the maximum number of results returned?	Yes		
4. Taxpayer Records	YES	NO	Cost to Modify
4.1. Does the application allow multiple owners per parcel/account?	Yes		
4.2. Does the system allow for official documents to be entered out of chronological order?	Yes		
4.3. Does the system allow for a user to undo a deed entry?	Yes		
4.4. Does the system allow a user to update one mailing address for multiple accounts?	Yes		
4.4.1. If so, can the user specify what accounts are updated?	Yes		
4.5. If so, are the interests and values maintained at the account level	Yes		
4.6. Does the system support multiple addresses per taxpayer?	Yes		
4.7. If so, does the system allow the user to indicate which address is for mailing?	Yes		
4.8. Does the system support multiple phone numbers per taxpayer?	Yes		
4.9. Does the system support CASS Certification information?	Yes		
4.10. Does the system allow for document images be scanned or attached to taxpayer records?	Yes		
4.10.1. Does the system allow for official documents to be entered out of chronological order?	Yes		
4.11. Does the system allow for identification or flagging International Addresses?	Yes		
4.12. Does the system provide the ability to flag returned mail?	Yes		
4.12.1. Does the system provide for the mailing address to default back to the situs address after a set number of mail returns?	Yes		
4.13. Does the system provide importing of national change of address (NCOA) data?	Yes		
4.14. Does the system allow for identification or flagging of "confidential" owners such as police officers?	Yes		
4.15. Is confidential and PII stored in an encrypted format?	Yes		
4.16. Are property descriptions maintained distinctly by year?	Yes		
4.17. Does the system support 10 or more taxing entities on a single account?	Yes		
	Yes		

4.18. Does the system support 8 or more exemptions on a single account?	Yes		
4.19. Does the system support 100 or more taxing entities?	Yes		
4.20. Does the system support 50 or more exemptions?	Yes		
4.21. Does the system have an integrated online exemption application tool?		No	
4.22. Can an account be inactivated or deleted? If so...			
4.22.1. Can it be recovered at a later date?	Yes		
4.22.2. Can an account be inactivated or deleted for a future date?	Yes		
4.22.3. Can a deleted account be searched?	Yes		
4.22.4. Can an account be activated or created for a future date?	Yes		
4.22.5. Does the system allow you to create or delete an account as of a specific date without changing the system's effective date?	Yes		
4.23. Does the recover process restore the original improvement and land appraisal information?	Yes		
4.23.1. If so, is a history of permits maintained?	Yes		
4.24. Does the system support multiple Situs Addresses?	Yes		
4.25. Does the system support multiple Doing Business As (DBA)?	Yes		
4.26. Does the system support multiple email addresses?	Yes		
4.27. Does the system track agreement for taxpayer to receive Electronic Communication?	Yes		
4.27.1. If so, Does the system indicate which type of communication will be electronic? (E.g. Appraisal Notices, Tax Statements, Online Appeals)	Yes		
	Yes		
5. Splits and Merges	Yes	No	Cost to Modify
5.1. Does the system provide the ability to split property through the use of a Help Wizard?	Yes		
5.2. Does the system have a GIS tool to process splits and merges?	Yes		
5.3. Does the system have a splits/merge workflow process?	Yes		
5.4. Does the system support copying land segments, improvements, and images to other accounts?	Yes		
5.5. Can the user see all history involved with all splits of a property?	Yes		
5.6. Does the system provide the ability to merge property through the use of a Help Wizard?	Yes		
5.6.1. If so, can the user see all history involved with all property merges?	Yes		
5.7. Does the system provide the ability to mass create new properties through the use of a Help Wizard?	Yes		
5.8. Does the system allow for certain data of BPP properties such as situs and entities to be linked and imported from the real property at that same location?	Yes		
5.9. Does the system provide the ability to link properties?	Yes		
5.10. Does the system provide the ability to split property through the use of a Help Wizard?	Yes		
5.10.1. If so, can the user see all history involved with all splits of a property?	Yes		
5.10.2. If so, can the user see all history involved with all property merges?	Yes		
5.11. Does the system allow a user to undo splits or merges?	Yes		
5.12. Does the system allow splits or merges to occur out of chronological order?		No	
5.13. Does the system allow the user to view the properties to be split in GIS?	Yes		
5.14. Does the system allow the user to view the properties to be merged in GIS?	Yes		

Description of AA GAMA - Evaluator Functionality

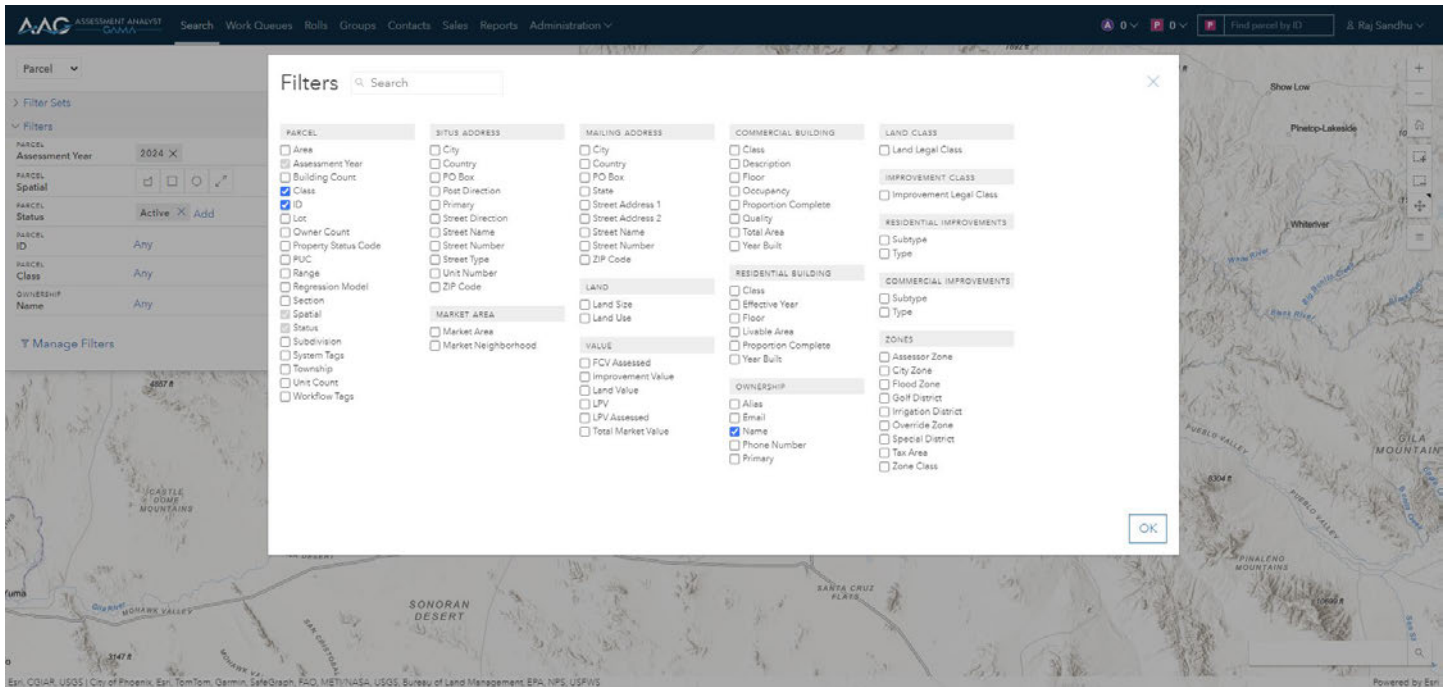
RFP Item: 3

RFP Table Title: Parcel/Account Search Information Capabilities and Advantages

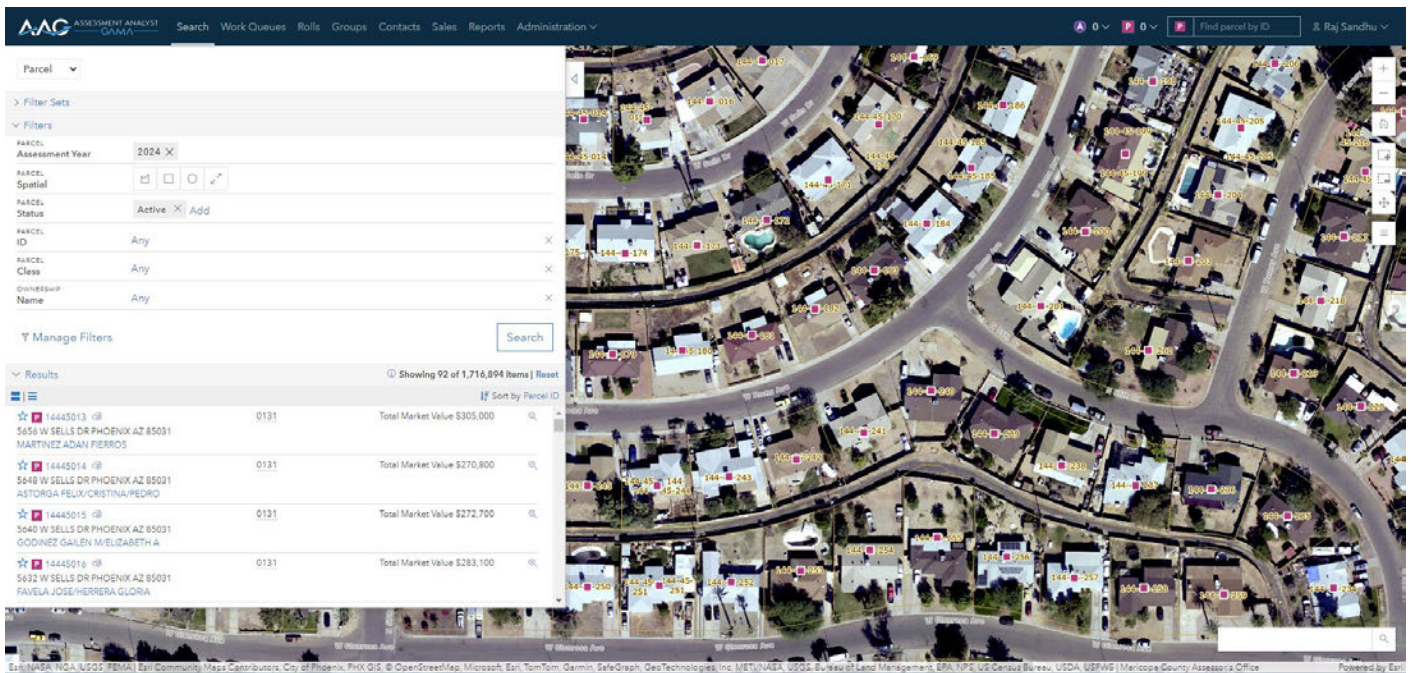
Overall Description

AA GAMA - Evaluator offers robust and flexible searching options through both advanced and quick search. All attributes in GAMA area searchable and upon configuration any new fields needed are made searchable.

AA GAMA – Evaluator Screenshot Examples



Configurable Search Filters



Search Results – Spatial and Tabular

Key Items

- AA GAMA - Evaluator's advanced search offers the user a variety of operators for the user to refine their searches which act in place of wildcard operators.
- Search results are returned spatially as well in tabular form and all result are downloadable to a CSV File.
- The search functions performance in almost instantaneous with over 1.7 million accounts searched for in less than a second.

Summary

All required attributes from TAD will be localized and/or configured and searchable.

Description of AA GAMA - Evaluator Functionality

RFP Item: 4

RFP Table Title: Taxpayer Records Capabilities and Advantages

Overall Description

Our application is USPS and Canada Post compliant via integrations with postal API's driven directly from AA GAMA - Evaluator which are configured during implementation. Through configurations of URLs and customer license keys, we can integrate AA GAMA - Evaluator with USPS, CASS, NCOALink and other web APIs that validate address data standards, compliance and errors. Address data entry into the application is already parsed data in USPS format, reducing errors and omissions right from the initial data migrations into AA GAMA - Evaluator and uniformity of the data is further maintained via business rule logic and error notifications.

Exemptions in AA GAMA - Evaluator are tax-period enabled, and include Personal, Organizational, and BPP type exemptions. There is no limit to the number of exemptions that can exist in the system. Exemptions can be applied using the Workflow Engine in AA GAMA - Evaluator or applied individually by a specific user based on configured privileges.

The AA GAMA - Evaluator Online exemption (forms/applications) tool is in our immediate product road map and being delivered Q4, 2024. There are other options for this functionality that can be configured currently;

- Integrate with the current online solution in place at TAD.
- [REDACTED]

AA GAMA – Evaluator Screenshot Examples

Name	Description	Active	Years to Expire
1	501c3 Religious Organization	<input checked="" type="checkbox"/>	0
10	Leased to a Church	<input checked="" type="checkbox"/>	1
11	Leased to a Charter School	<input checked="" type="checkbox"/>	0
2	Cemetery	<input checked="" type="checkbox"/>	0
3	Hospitals	<input checked="" type="checkbox"/>	1
4	Non-profit organization	<input checked="" type="checkbox"/>	1
5	Religious organization w/o 501c3	<input checked="" type="checkbox"/>	1
6	Govt / owned charter schools	<input checked="" type="checkbox"/>	0
7	Veteran's organization	<input checked="" type="checkbox"/>	1
8	SFR Housing organization	<input checked="" type="checkbox"/>	1
9	Multi-family housing organization	<input checked="" type="checkbox"/>	1

Exemptions Interface

System Settings

- Business Rules
- Characteristics
- Depreciation Rates
- Elasticsearch
- Exemptions
- Field Configuration
- Groups
- Localization
- Lookups
- Lookup Sets
- Privileges
- Regression
- Tags
- Tax Periods
- Users
- Workflows**
- Valuation

Workflows + Add

- Claim
- Claim Account
- Common Area Appl
- CVP Hand Resolution
- CVP Resolution
- Deeds_Sales
- Desktop Review
- Discovery Follow Up
- GAMA User Guides
- Golf - Rounds Played
- Historical Tax Exemption**
- Income Returns
- Litigation Accounts
- Litigation CVP
- Litigation Parcels
- Mailing Address (Account)
- Many Review
- MARS Appeal Test
- MH 504 Request
- MH Account Ownership
- MH Aif of Affix
- MH Research

Historical Tax Exemption Workflow [Edit] [X]

Workflow Name: Historical Tax Exemption Active Can Be Created

Items

Items to associate with the workflow: Parcel

Items per workflow task: Many

Allow association only if item status is: Active

Concurrent active workflow tasks per item: Many

Item characteristics to become folio fat columns:

Groups

Default Assign To Group: Assign to Creator

Allowed to View Tasks:

Allowed to Edit Tasks:

Columns

Type	Column Name	Options
Column 1 - Fixed	Status	
Column 2 - Fixed	Created	

Exemptions Workflow

OE Application for Parcels [X]

Status: Open

Assessment Year: 2024

Received: month/day/year

OnBase: OnBase

Additional Contact:

Parcels: 50070004P

Waiver: month/day/year

Sales Force #:

OE Statute: 42-11102 - Exemp...

Selected Contact:

IRC Type:

Letter Comments:

Assignment

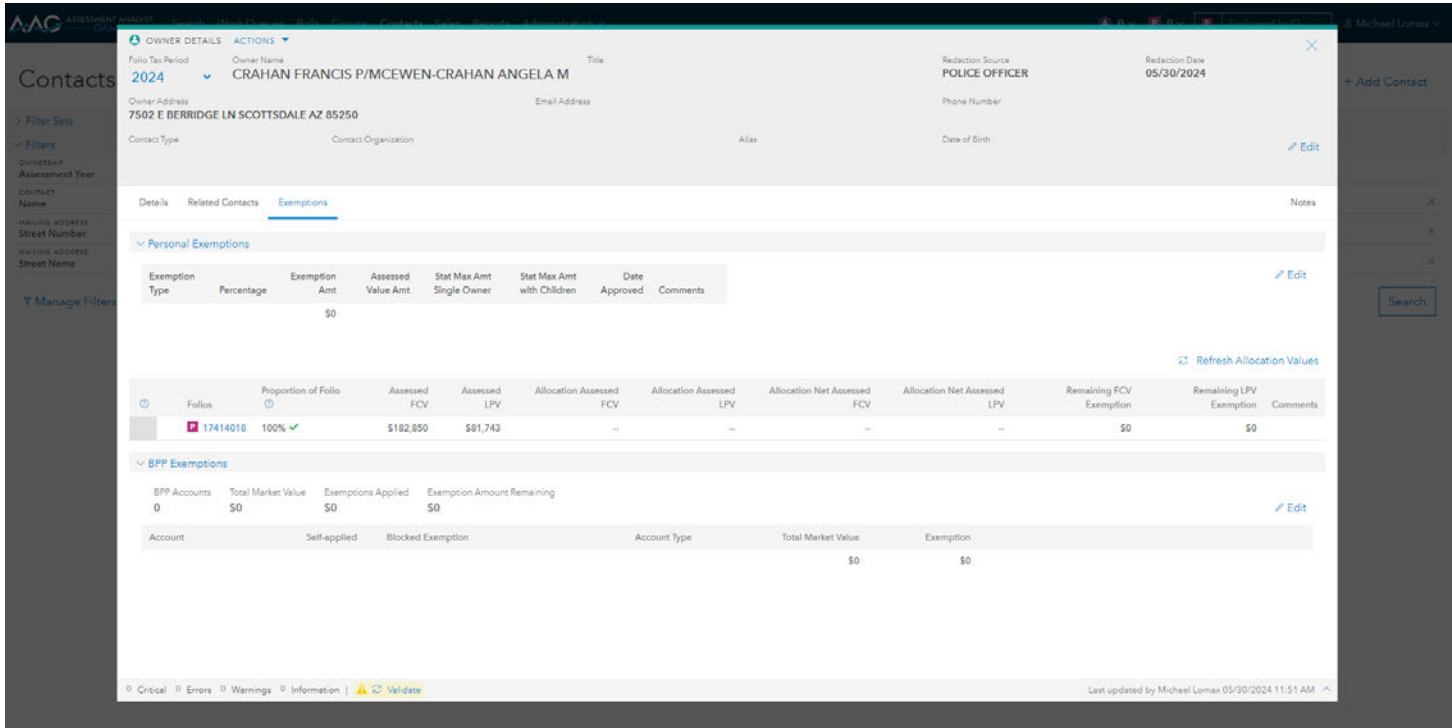
Group	Assigned To	Created	Assigned	Transferred	Completed
SD1A	GREGORY GINGELL	08/23/2023	08/24/2023		

Work History

Group	Assigned To	Created	Assigned	Transferred	Completed
SD1A	Gregory Gingell	08/24/2023 9:09 AM	08/23/2023 1:56 PM	2024	50070004P
SD1A	Gregory Gingell	08/24/2023 9:09 AM	08/23/2023 1:56 PM	2024	50070004N
SD1A	Gregory Gingell	08/24/2023 9:09 AM	08/23/2023 1:56 PM	2024	50070004M

1 - 10 of 20 items

OE Application



Key Items

- Online forms can be configured many ways in AA GAMA - Evaluator currently using Esri Hub, Survey 123, Esri Portal, Integrations to existing website etc.
- In addition to the previous point, the AA GAMA - Evaluator Product online forms is in our Product Road Map for release later this year (Q4).
- AA GAMA - Evaluator Workflow Engine can be used to drive many changes to ownership/taxpayers records for example; ownership changes, exemptions applied & approved via workflow.
- GAMA records, tracks and maintains complex ownership and contact structures.
- Exemption types and configurations are unlimited in AA GAMA - Evaluator and can be applied at various levels; ownership, components, parcel or accounts.
- User Administrators (TAD Admins) can amend exemption types, amounts and approaches post live deployment rather than having to call a vendor to assist TAD at a cost.

Summary

AA GAMA - Evaluator is a comprehensive enterprise application and as such, easily meets or exceeds the requirements stipulated for Taxpayer Records. The application can contain multiple owners, attachments, genealogy, event tracking, address verifications among many other features that are configured based on the customers/users requirements.

Description of AA GAMA - Evaluator Functionality

RFP Item: 5

RFP Table Title: Splits and Merges Capabilities and Advantages

Overall Description

AA GAMA - Evaluator utilizes the configurable workflow engine to assist the end user when processing splits and merges. The application walks the user through a series of steps to perform and split or merge to maintain uniformity and consistently amongst the users and organization. The history of the split or merge is recorded on the parcel and is able to be viewed at any time in a prior year record and visually on a map

AA GAMA – Evaluator Screenshot Examples

The screenshot displays the 'Deeds/Plats' modal window in the AA GAMA - Evaluator application. The modal is titled 'Deeds/Plats' and contains the following information:

- Status:** O - Open
- ID:** 20230209135
- Source:** R
- Recorded:** 04/24/2023
- Type:** AF
- Has Affidavit:**
- MCR Number:**
- Subtype:** SP - Split
- Assessment Year:** 2023-2025+
- Parcels:** 10101001C [+2]
- Actions:**
 - Create Child Parcels
 - Transfer Ownership
 - Update Geometry
 - Allocate Improvements & Value
 - Activate Parcels
- Assignment:**
 - Group:** AT1A
 - Assigned To:** VASILEV, ROBERT
 - Received:** 04/27/2023
 - Assigned:** 09/01/2023
 - Transferred:** 05/19/2023
 - Completed:**
 - Comments:** AA
- Work History:** (Link to view history)

The background interface shows a 'Groups Work Queue' with 'My Work Queue' containing 1106 tasks. A 'Task' list is visible with columns for 'Task', 'Completion', and 'Assigned To'. The 'Task' list includes several 'AT1A' tasks assigned to 'Vasilev, Rob'.

Help Wizard to Assist with Split/Merge Process



22034050A	
Tax Period 2025 NOC 12/31/2024	Rollover
22034050A	
Tax Period 2024 05/10/2024	Split
7 Records	
READY FOR QC C 1/2 - JOB: 201297 PUC: 0819, Survey 20230248968, cloned workflow because there is an APV	
Tax Period 2024 12/31/2023	Rollover
22034050A	

Split/Merge History Visible from Parcel Record

Key Items

- Utilizes help wizard and provides all user with consistent steps.
- All history of splits and merges kept for reference.
- Splits and merges viewable in GIS.

Summary

Configurable workflow functionality meets all requirements for split and merge functionality.

6. TIF Zone Data	Yes	No	Cost to Modify
6.1. Does the system track TIF zone data (Base Year, Expiration year, Description or Name, Code, type, participating entities)?	Yes		
6.2. Does the system track Base Market and Base Taxable value by entity?	Yes		
6.3. Does the system allow for correcting the base year values?	Yes		
6.4. Does the system generate reports and letters for the related entities?	Yes		
6.5. Does the system generate summary and detail reports?	Yes		
6.6. Does the Summary report show the Base and the Current year values and increment?	Yes		
6.7. Can reports be run for specific entities?	Yes		
6.8. Are the reports user configurable allowing adding and removing fields?	Yes		
6.9. Does the report allow showing the amount of value under litigation?	Yes		
6.10. Does the report allow showing the amount of value under ARB review?	Yes		
6.11. Does the report show certified vs non-certified values?	Yes		
6.12. Does the report show the value of new construction?	Yes		
6.13. Does the report show exempt value?	Yes		
6.14. Does the report show exempt value by exemption type?	Yes		
6.15. Does the report show a count of properties for the current year?	Yes		
6.16. Does the report show a count of properties for the prior year?	Yes		
6.17. Does the report show a count of properties for the base year?	Yes		
6.18. Does the report show a grand total of all the accounts?	Yes		
6.19. Does the report show the base year?	Yes		
6.20. Does the presence of a TIF code display on the property summary screen?	Yes		
6.21. Does property split or plat process flag accounts with a TIF value or provide a way to distribute the base value?	Yes		
6.22. Is the system able to track changes in total base value for a TIF?	Yes		
6.23. Is the system able to display TIF properties on the GIS viewer?	Yes		
7. Corrections to the Certified Roll	Yes	No	Cost to Modify
7.1. Does the system keep certified history by year?	Yes		
7.1.1. Does the system track 10 years of certified history?	Yes		
7.2. Does the system allow for corrections, additions or deletions to the certified roll?	Yes		
7.2.1. Does the system allow for modification of 10 prior years?	Yes		
7.3. Does the system allow for omitted property and omitted improvement tracking for the purpose of correcting the roll?	Yes		
7.4. Does each supplemental roll only include changes made since the last supplemental roll was certified?	Yes		
7.5. Can the roll's date range be specified by the user?	Yes		
7.6. Can users continue data entry while the roll is being generated?	Yes		
7.7. Does the system have an automated process of transferring changed information to collections for bill adjustments to take place?	Yes		
7.7.1. Does the system allow for 10 years to be "transferred" to collections?	Yes		
7.8. Does the system keep full appraisal information by year? (Does the system keep a full complement of land, improvement, and business personal property information by year?)	Yes		
7.8.1. If so, can a property be "recalculated" for a prior year without affecting current values?	Yes		
7.9. Does the system print a supplemental roll listing all property involved in the corrections?	Yes		
7.9.1. Can this roll be grouped by entity?	Yes		
7.9.2. Can this roll be grouped by year?	Yes		

7.9.3. Can this roll be grouped by supplemental action? (i.e. adds, changes, deletes)	Yes		
7.9.4. Does this roll print a summary totals page indicating the gains or losses for each entity?	Yes		
7.9.5. Can this roll be re-printed on demand?	Yes		
7.9.6. Can this roll be re-printed even if subsequent rolls have been accepted?	Yes		
7.9.7. Does the system generate an Adjusted History Total after each supplement?	Yes		
7.9.8. Can multiple supplement groups be opened at the same time?	Yes		
7.10. Does the system allow for a "future supplement" to be started to allow for the 30- day notice requirement?	Yes		
8. Agent Identification	Yes	No	Cost to Modify
8.1. Can agents be created on the system (AoA or Appointment of Agent)?	Yes		
8.2. Does the system allow users to easily, two clicks or less from the main account, identify the authorities assigned to an agent prior to assisting a customer?			
8.3. Can the system support all the same contact fields as it does for Taxpayers?	Yes		
8.4. Can multiple agents be assigned to one parcel?	Yes		
8.5. Can multiple parcels be assigned to one agent?	Yes		
8.6. Can authorities be defined on an agent for a parcel?	Yes		
8.7. Can agents be authorized on accounts in mass?	Yes		
8.8. Can agents be revoked in mass (RoA or Revocation of Agent)?	Yes		
8.9. Can it keep chronological AoA/RoA history at the account level?	Yes		
8.10. Can it analyze entered data and auto determine if the information is a duplicate?	Yes		
8.11. Can it analyze entered data and auto determine if the agent/agency has already been revoked?	Yes		
8.12. Can it post duplicate submittal information in chronological order?	Yes		
8.13. If an RoA has been submitted prior to the AoA being submitted, can it maintain that information and auto revoke the AoA when it is submitted?		No	■
8.14. Can authorization be revoked on Dashboard by property owner or agent?	Yes		
8.15. Can it automatically send notifications to the affected parties upon the processing of AoA/RoA?	Yes		
8.16. Does it have OCR ability to read and enter data from scanned documents?		No	■
8.17. Does it automatically update and produce all the Comptroller required reports and surveys?		No	■
8.18. Does the system allow for document images be scanned or attached to agent records?		No	■
	Yes		
9. Import Information	Yes	No	Cost to Modify
9.1. Does the system allow importing appraisal data?	Yes		
9.2. Does the system allow importing building permits?	Yes		
9.3. Does the system allow importing CASS data?	Yes		
9.4. Does the system allow importing corrected Situs Zip Codes? (new post offices created)	Yes		
9.5. Does the system allow importing mailing address information provided from the USPS?	Yes		
9.6. Does the system allow importing owner identification information from TXDPS or similar agency?	Yes		
9.7. Does the system allow importing death information from TX Dept of Vital Statistics or similar agency?	Yes		
	Yes		

9.8. Does the system allow importing mineral data from multiple vendors?	Yes		
9.9. Does the system allow custom imports and mapping of tabular data files?	Yes		
9.10. Does the system allow importing mortgage company records?			
9.11. Does the system include preconfigured imports all the major appraisal vendors standard exports?	Yes		
9.12. Do all imports from appraisal vendors capture new value?	Yes		
9.13. Do all imports from appraisal vendors capture ownership changes?	Yes		
9.14. Does the import tool generate custom change reports showing before and after values?	Yes		
9.15. Does the system allow for the import of collection and tax payment events?	Yes		
9.16. Does the system import exemption data from appraisal vendors?	Yes		
9.17. Does the system import abatement data from appraisal vendors?	Yes		
10.Export Information	Yes	No	Cost to Modify
10.1. Does the system allow exporting application data?	Yes		
10.2. Does the system allow exporting appraisal information?	Yes		
10.3. Does the system allow exporting CASS data?	Yes		
10.4. Does the system allow exporting Situs Address for zip code correction?	Yes		
10.5. Does the system allow exporting ownership changes?	Yes		
10.6. Does the system allow exporting property summary data?	Yes		
10.7. Does the system allow exporting shared property data?	Yes		
10.8. Does the system allow exporting sales submission data?	Yes		
10.9. Does the system allow exporting state reviewer data?	Yes		
10.10. Does the system allow exporting truth-in-taxation data?	Yes		
10.11. Does the system allow for modification and adding fields to existing exports?	Yes		
10.12. Does the system allow users to develop custom exports?	Yes		
10.13. Does the system allow exports to be scheduled and processed automatically?	Yes		
11.Event Tracking	Yes	No	Cost to Modify
11.1. Does the system track all system-defined events for a property such as notice generated, protest generated, ownership transfers, etc.?	Yes		
11.2. Does the system keep an exact copy of the appraisal notice that was generated?	Yes		
11.3. Does the system allow for user-defined events?	Yes		
11.4. Does the system display in a chronological order the events attached to a property?	Yes		
11.5. Does the system allow the user to see events for a property?	Yes		
11.6. Does the system allow the user to see the appraisal and collections events for a property at the same time?	Yes		
11.7. Does the system allow the user to attach any Windows objects (i.e., video, images, etc.) to an event for a property?	Yes		
12.Change Log Administration	Yes	No	Cost to Modify
12.1. Does the system allow identification of fields to be tracked when changed?	Yes		
12.2. Does the system allow viewing of all changes made to the fields being tracked?	Yes		
12.3. Does the system show a before and after picture of the fields that change?	Yes		
12.4. Does the system track changes to records even when performed outside of the application such as an update statement using SQL?	Yes		
12.5. Does the system allow for customizable change reports?	Yes		
12.6. Does the system for change reports of changes by specific users?	Yes		

Description of AA GAMA - Evaluator Functionality

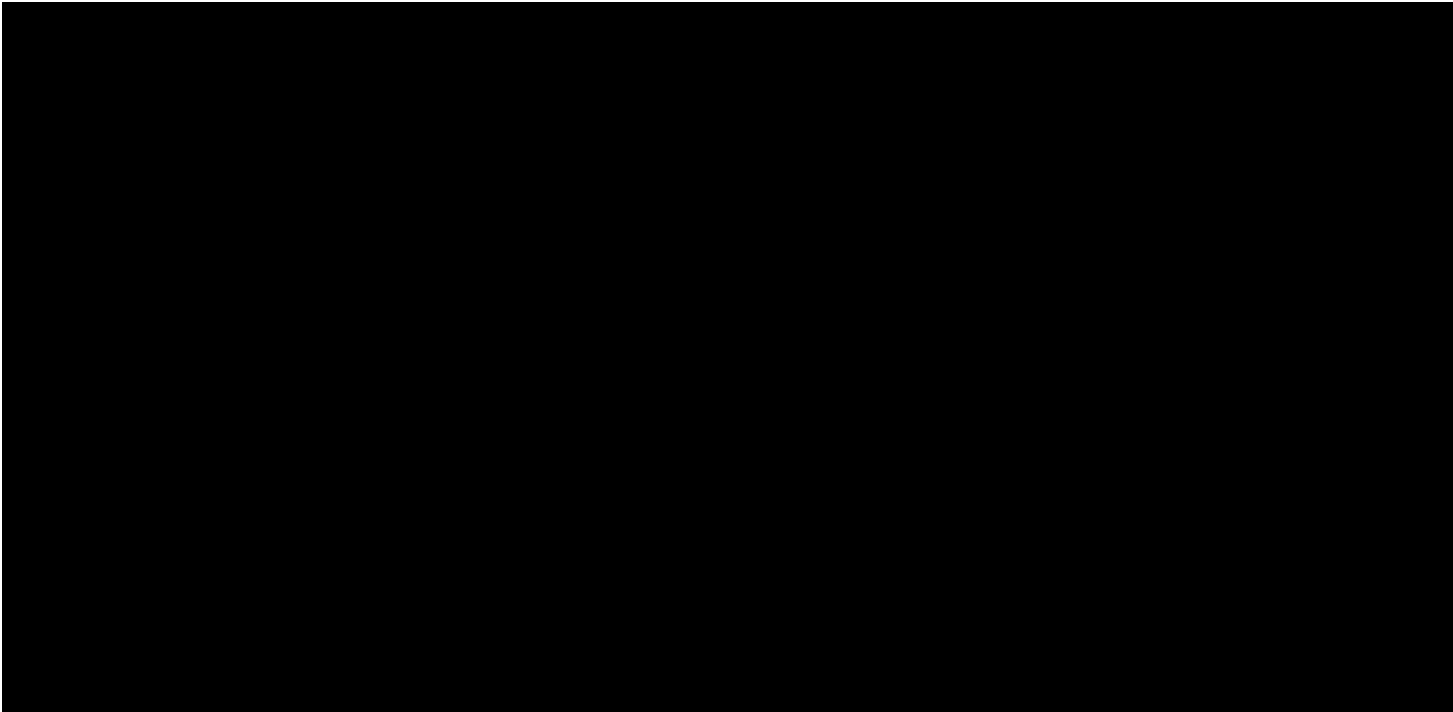
RFP Item: 6

RFP Table Title: TIF Zone Data Capabilities and Advantages

Overall Description

All TIF zone data is tracked using attributes and characteristics in AA GAMA - Evaluator. Data is available in a Reporting Database which is refreshed nightly. The reporting database contains all data elements in AA GAMA - Evaluator for reporting purposes. [REDACTED]

Reporting from GAMA is highly flexible and configurable, and any reports can be revised at any time.



Key Items

- All TIF data is stored in Report Screen in AA GAMA - Evaluator as either attributes or characteristics.
- [REDACTED]
- All reports will be configured based to be the above requirements and are highly configurable and editable. Reports can be revised at any time.
- Reports can be configured by entity to include any data and associated values as required (e.g. base market and taxable market).
- TIF Code is available to view on the parcel summary screen and spatially.

Summary

All TIF data and associated values will be stored in AA GAMA - Evaluator and are available for reporting purposes. Reports in AA GAMA - Evaluator are highly configurable and can be revised/updated at any time.

Description of AA GAMA - Evaluator Functionality

RFP Item: 7

RFP Table Title: Corrections to the Certified Roll Capabilities and Advantages

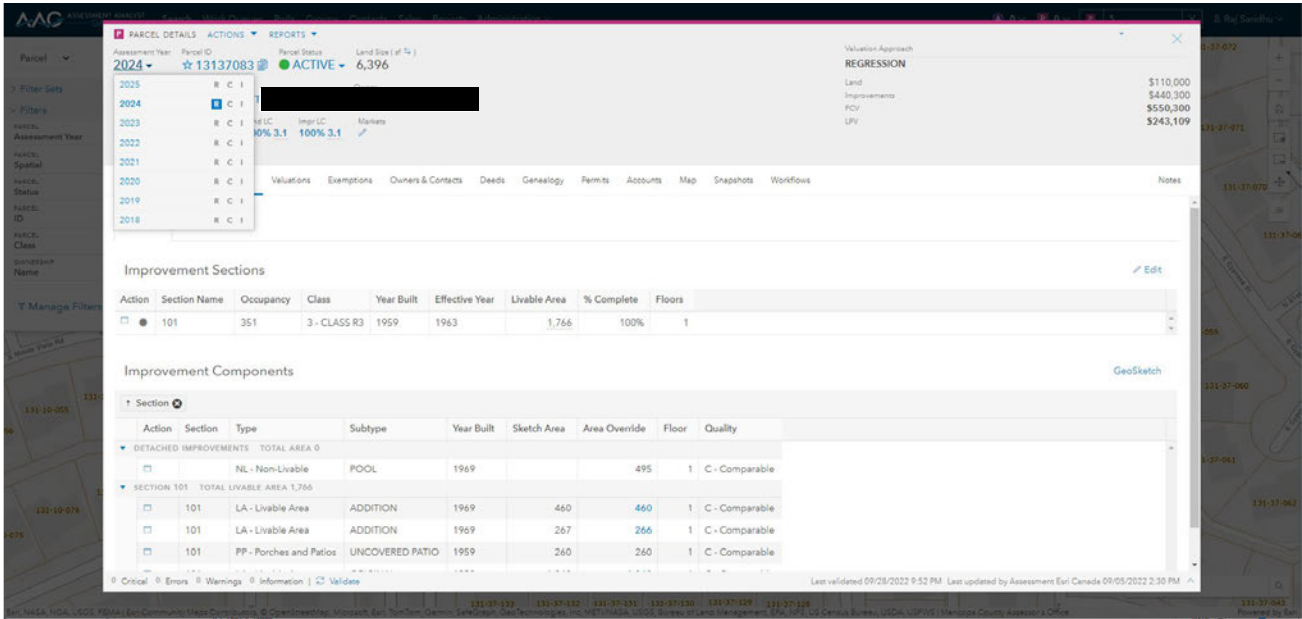
Overall Description

AA GAMA - Evaluator is tax period/year enabled and all assessment history and data is stored by tax period/year. AA GAMA - Evaluator allows for rolls to be certified and once certified, the roll details are visible by tax period/year each account. Users with sufficient privileges may run the Assessment Roll to view and analyze it as many times as necessary and when satisfied with the result may mark the roll as certified. Edits to certified rolls can be made through the use of supplemental rolls and supplemental rolls can also be certified. All appraisal and assessment information is stored by tax period/year and the year can be changed in the user interface at any time.

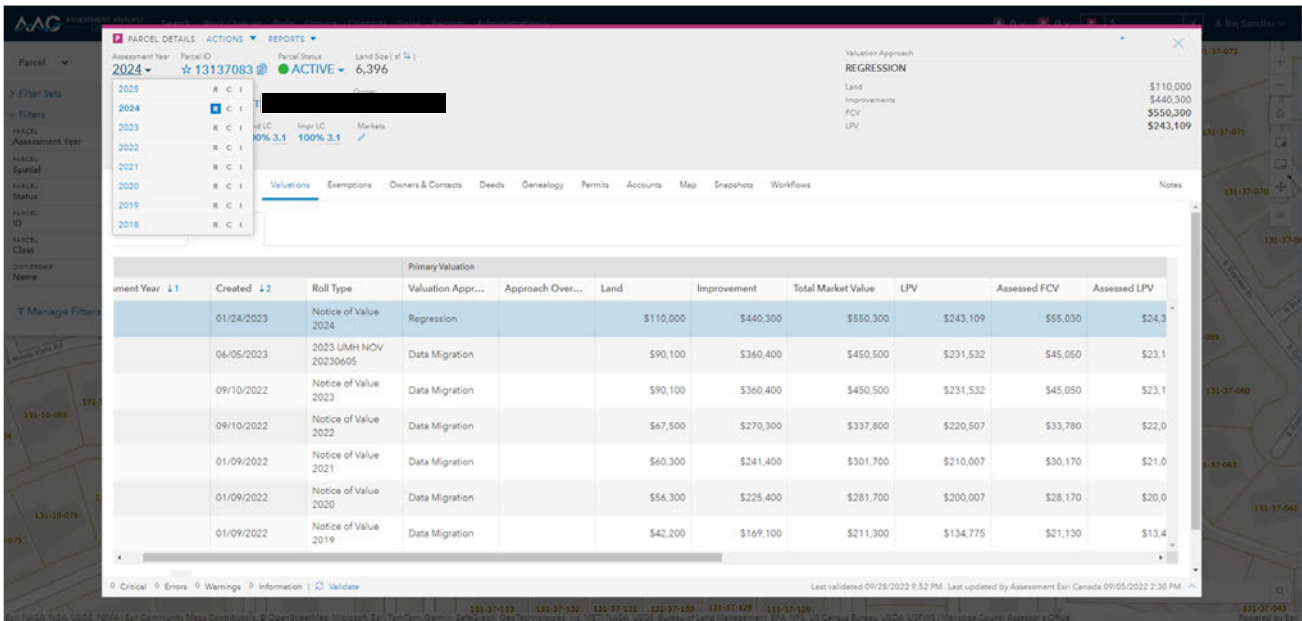
AA GAMA – Evaluator Screenshot Examples

Actions	Certified Roll	Roll Name	Created	Status	Count
View Export		Working 2023	Current	Open	1886595
View Export	<input type="checkbox"/>	✓ 2023 TR2	07/31/2023 7:36 PM	Done	1886154
View Export	<input type="checkbox"/>	✓ 2023 TAX ROLL	07/28/2023 10:34 PM	Done	1886143
View Export	<input type="checkbox"/>	✓ 2023 BPP NOV	07/17/2023 6:56 PM	Done	1867735
View Export	<input type="checkbox"/>	✓ 2023 OLD BPP NOV	07/16/2023 9:39 AM	Done	1867735
View Export	<input type="checkbox"/>	✓ 2023 PRELIM TAX ROLL	07/07/2023 7:41 PM	Done	1864336
View Export	<input type="checkbox"/>	✓ 2023 UMH NOV 20230605	06/05/2023 5:35 PM	Done	1864268
View Export	<input type="checkbox"/>	✓ Notice of Value 2023	09/10/2022 12:26 PM	Done	1708331

Rolls and Certification by Tax Period/Year



1. Appraisal Information and Certified Roll History on Account



2. Appraisal Information and Certified Roll History on Account

Key Items

- Users with sufficient privileges can run and certify the assessment roll and supplementary roll(s) when deemed necessary.
- AA GAMA - Evaluator allows for edits of certified roll in multiple ways including a supplementary roll that can show changes in the supplementary period only.
- All certified roll history can be viewed at the account level at any time.

- All appraisal information is stored and viewed by tax period/year.
- Calculations of values are independent by year.
- Reports can be generated and configured from the certified roll based on the needs of TAD.

Summary

- All certified rolls and associated appraisal history is retained for 10 years or as required.
- Supplementary rolls allow certified roll to be edited.
- Highly configurable reports can be run from certified rolls for downstream reporting.

Description of AA GAMA - Evaluator Functionality

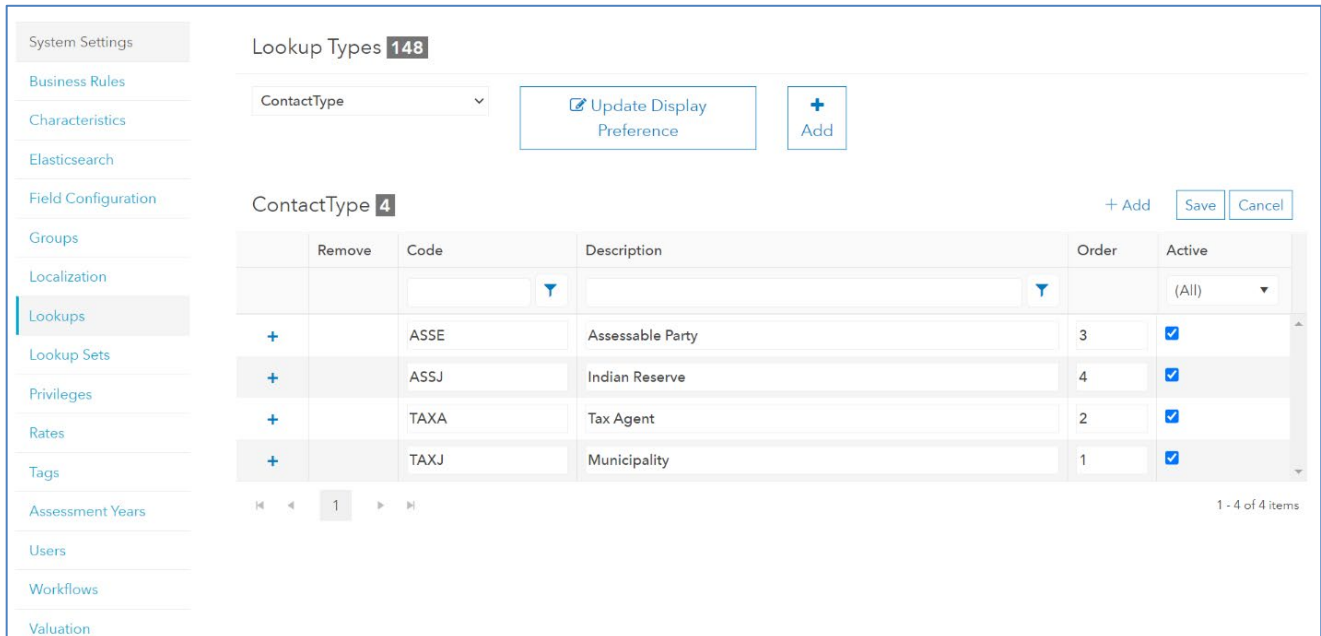
RFP Item: 8

RFP Table Title: Agent Identification Capabilities and Advantages

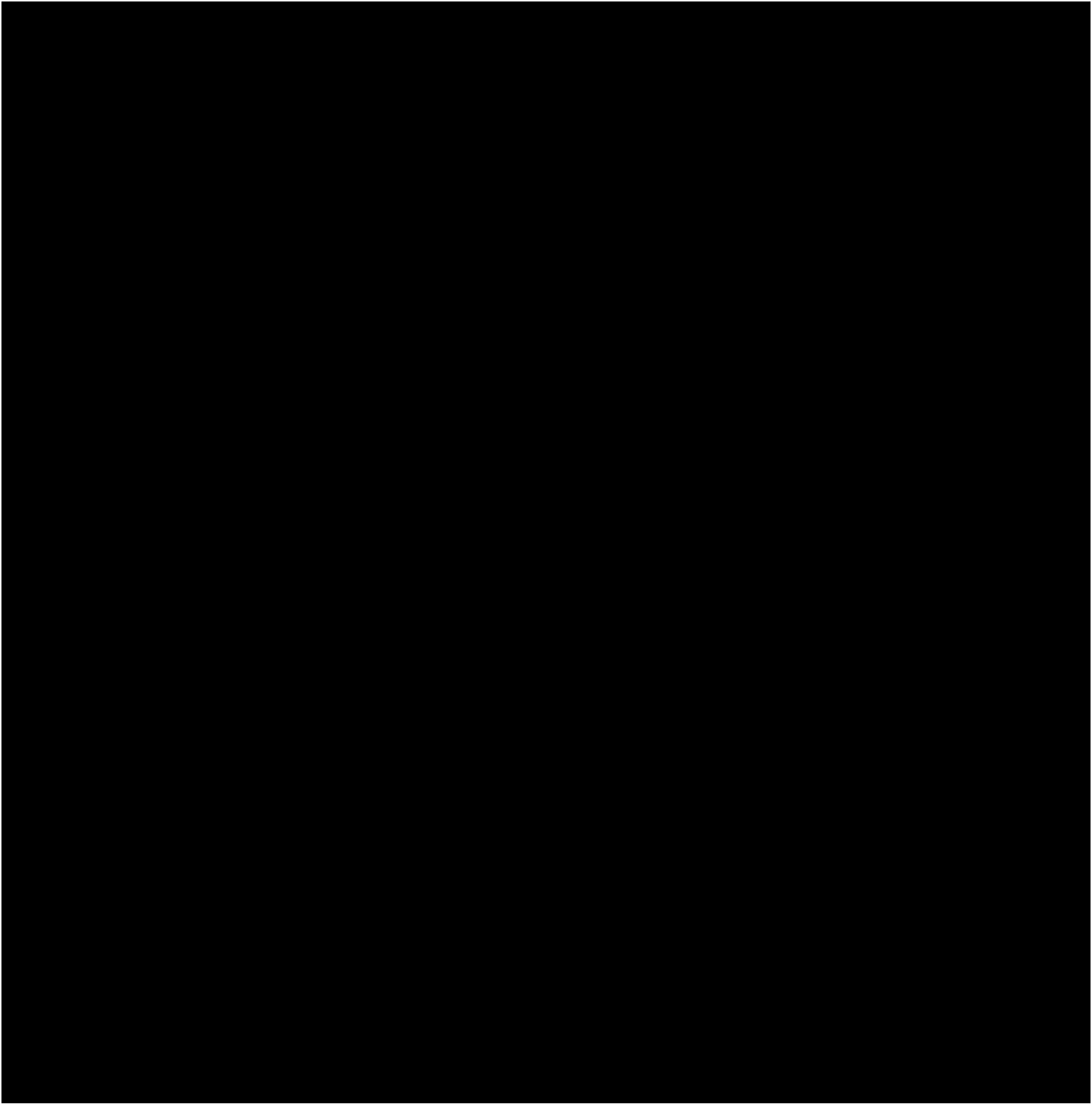
Overall Description

AA GAMA - Evaluator can be configured to load Tax Agents as Contacts that are related to one or many Parcel ID's (Roll Numbers). Contacts within the application act in the same manner as Owners in that a property can have the legally defined "Owner(s)" associated with it and it can also have authorized "Contact(s)" whether they are Agents, DBA, Guardians, Relations etc. The lookup lists of "Types" is configurable based on the needs/requirements of TAD.

AA GAMA – Evaluator Screenshot Examples



Lookup Interface



Key Items

- Agents are Contacts in AA GAMA – Evaluator which operate the same as Owners and attached to authorized Parcel ID’s (Roll Numbers)
- Contacts can be configured for various types and levels of authorization.
- Import scripts can be configured and executed for Agent assignments “en-mass” .

Summary

Agents are well addressed in AA GAMA – Evaluator and are configured for Contacts, Appeal(s) workflows and import routines when done “en-mass”. Through Business Analysis with TAD and our Business Analysts, we document the use cases and configure GAMA to meet the requirements of Agents.

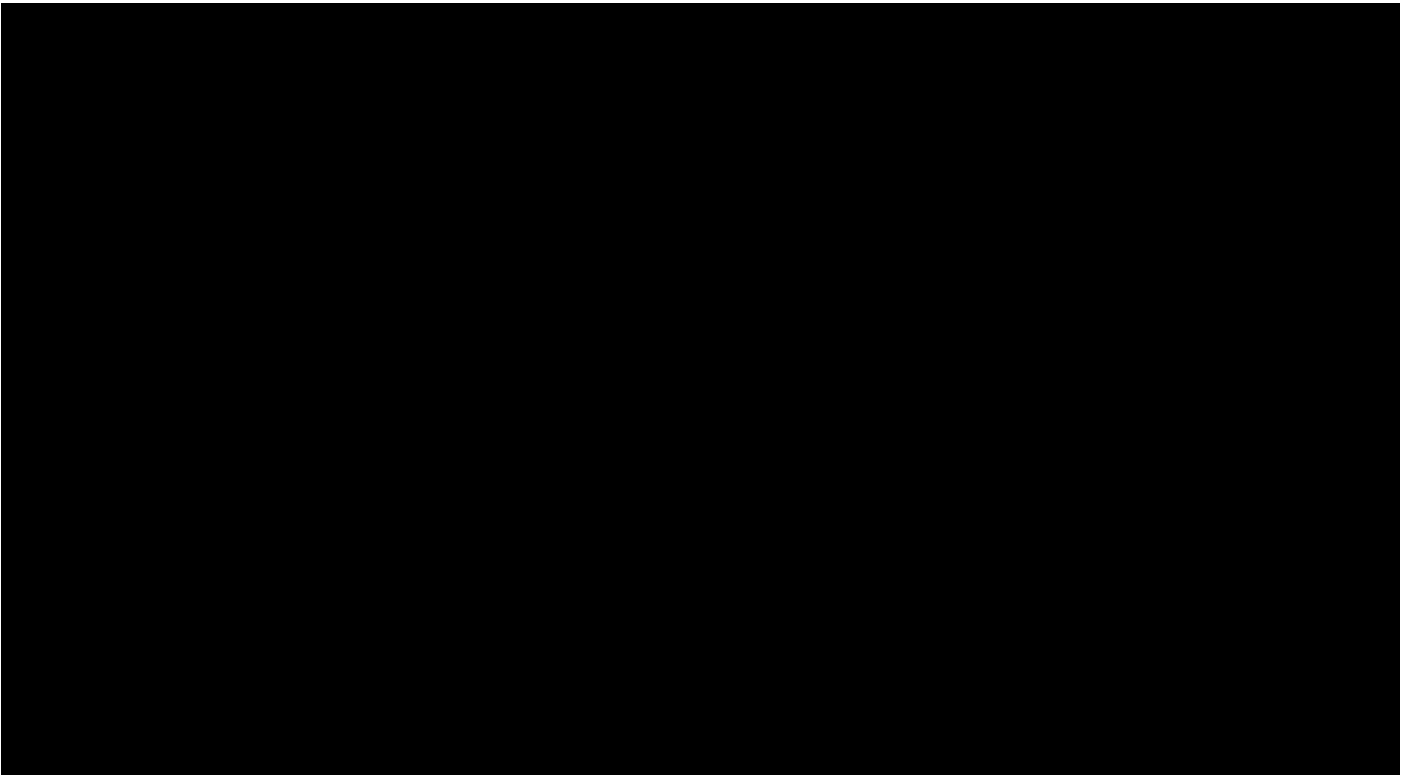
Description of AA GAMA - Evaluator Functionality

RFP Item: 9

RFP Table Title: Import Information Capabilities and Advantages

Overall Description

AA GAMA - Evaluator includes a highly configurable import engine that allows customers to bring in external data. All external data runs through a validation process to ensure no inconsistent or bad data is brought into the application. If required, workflow tasks can be automatically spawned and assigned to the applicable user(s).



- [Redacted]
- [Redacted]
- [Redacted]

[Redacted]

- External information is imported into AA GAMA - Evaluator and validated. All errors are available to view and address in an import summary report.

- All data from external sources must be mapped to fields in GAMA during configuration process.

Description of AA GAMA - Evaluator Functionality

RFP Item: 10

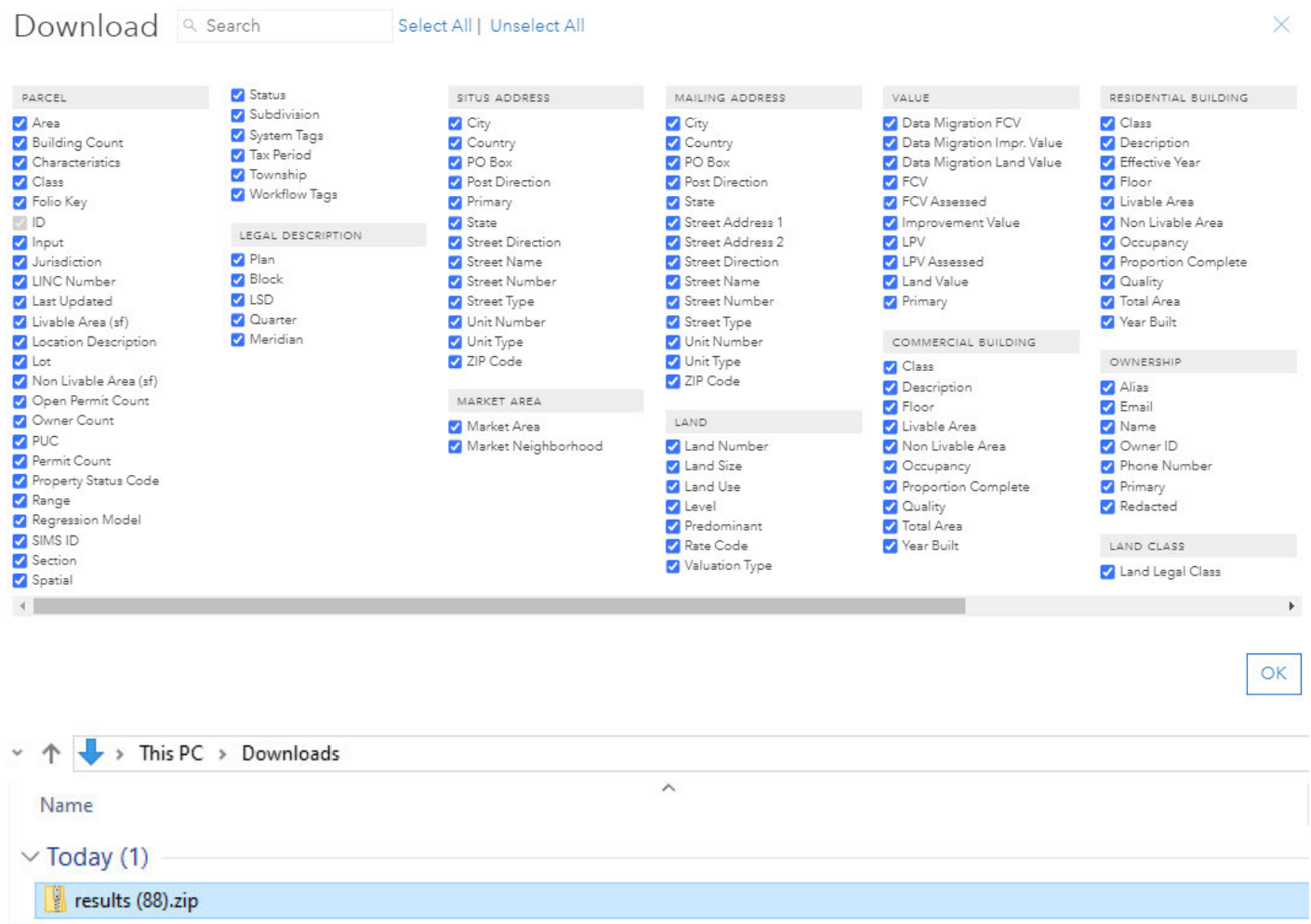
RFP Table Title: Export Information Capabilities and Advantages

Overall Description

AA GAMA - Evaluator features a comprehensive export functionality within the application, enabling users to define data sets through advanced search and export data sets of up to 100,000 records directly. For larger data sets, AA GAMA - Evaluator offers the capability to export data through a [REDACTED]

[REDACTED] This comprehensive export capability enhances data accessibility and usability for users.

AA GAMA – Evaluator Screenshot Examples



The output that is generated is a zip file with an Excel spreadsheet in .csv form. User can define the different data attributes that are able to download and extract from the application based on a self-select menu.

Key Items

- Comprehensive Export Capabilities: AA GAMA - Evaluator allows exporting various data types, including all the items listed within the requirements and more.
- Customizable and Automated Exports: Users can modify and add fields to existing exports, develop custom exports, and schedule exports for automatic processing, enhancing data accessibility and flexibility.
- [REDACTED]

Summary

- AA GAMA - Evaluator offers two comprehensive options for data extraction: directly through the application user interface for smaller data sets, [REDACTED] for larger jobs. Both methods support scheduling, ensuring timely and efficient data access.
- This inherent functionality within AA GAMA - Evaluator ensures it meets all listed requirements, providing users with flexible and robust data extraction capabilities.

Description of AA GAMA - Evaluator Functionality

RFP Item: 11

RFP Table Title: Event Tracking Capabilities and Advantages

Overall Description

Event tracking in AA GAMA - Evaluator is done in a variety of ways which are configured for the customer depending on what and how they want to track specific events in the application. There are 3 primary ways to record, track and action specific events or work processes.

Specifically;

- Workflow – workflow allows configuration of GAMA Evaluator for specific workflows that have large volumes of data and typically require the use of import feeds into GAMA.
- Genealogy – tracks changes to parcels over specific tax roll periods
- Tags – tags allow specific actions or events to be triggered either automatically or manually if specific actions or notifications of events is required.

Through our Business Analysis portion of the implementation, we analyze the event and make recommendations to your work team on the best way (method) to enable the specific event tracking requirements and notifications for your team. At that point, we configure the methodology as per the event tracking requirements.

AA GAMA - Evaluator Screenshot Examples

Event Tracking using Workflow:

The screenshot shows the AAC Assessment Analyst GAMA interface. The top navigation bar includes 'Search', 'Work Queues', 'Rolls', 'Groups', 'Contacts', 'Sales', and 'More'. The user is logged in as Michael Lornax. The 'My Work Queue' tab is active, showing 0 tasks. Summary cards indicate 73582 tasks in queue, 58588 unassigned tasks, 14994 assigned tasks, 0 completed tasks, and 0 transferred tasks. The 'Workflow Tasks' grid is displayed with the following data:

Task Type	Group	Assigned To	Created	Assigned	Transferred
Permit	AC5A	Unassigned	05/25/2024 9:25 AM		
Permit	AC4A	Unassigned	05/25/2024 9:25 AM		
Permit	AC4A	Unassigned	05/25/2024 9:24 AM		
Permit	AR4A	Unassigned	05/25/2024 9:24 AM		
Permit	AU1A	Unassigned	05/25/2024 9:24 AM		
Permit	AT1A	Unassigned	05/25/2024 9:24 AM		

While workflows themselves are configured through an Administrator in System Settings, users can add, edit, and work tasks through the Work Queues page. Each task type has its own grid, as well as the general work grid. In addition, your assigned tasks have their own tab.

The screenshot shows the AAC Assessment Analyst GAMA interface. The top navigation bar is the same as the previous screenshot. The 'My Work Queue' tab is active, showing 0 tasks. Summary cards indicate 905 tasks in queue, 510 unassigned tasks, 395 assigned tasks, 0 completed tasks, and 0 transferred tasks. The 'Claim' grid is displayed with the following data:

Claim ID	OnBase	Litigation Review	Date Received	Response Due Date	Meeting Date/Time
3279	OnBase	<input type="checkbox"/>			
3278	OnBase	<input type="checkbox"/>			
3277	OnBase	<input type="checkbox"/>			
3276	OnBase	<input type="checkbox"/>	03/05/2024	04/29/2024 Overdue	
3274	OnBase	<input type="checkbox"/>			

Each work grid can be filtered or navigated through Parcel ID. Tasks can be assigned one by one, or through bulk controls.

Task		Completion Status	Folio ID				
Claim	In Queue	Find parcel by ID	2 ITEMS SELECTED				
Workflow Tasks				Claim			
Group	Assigned To	Assigned	Status	Created	Tax Period	Parcels	
		month/day/...		year-month-...			
+ System Administration	Mars Valentine	2024-03-13 18:43:25	WORK In Progress	2024-03-13 18:43:13	2021		
+ System Administration	Mars Valentine	2024-03-13 18:43:33	WORK In Progress	2024-03-13 18:43:11	2020		

Tasks can be worked through tax period or folio assignment, or a variety of configurable steps, from either the work grid (left-to-right) or the work wrench (a pop-out form).

Status: Open

ID	Source	Recorded	Type	Has Affidavit	MCR Number
	R	09/11/2023	00	<input type="checkbox"/>	

Subtype: SP - Split | Tax Period: 2024-2025+ | Parcels: Parcel ID

Actions:

- Child Parcels Created
- Transfer Complete
- Geometry Updated
- Allocate Improvements & Value
- Activate Parcels

Assignment:

Group	Assigned To	Received	Assigned	Transferred	Completed
		09/13/2023	01/17/2024	01/16/2024	

Comments: [Icon]


> Work History

Close

Event Tracking using Genealogy:

The Parcel tab contains parcel fabric details which capture historical changes per tax period or parcel split/merge. For instance, in the case of a parent parcel being split into 2 child parcels, the genealogy tab will show a record of the split, along with the old and new parcel fabric.

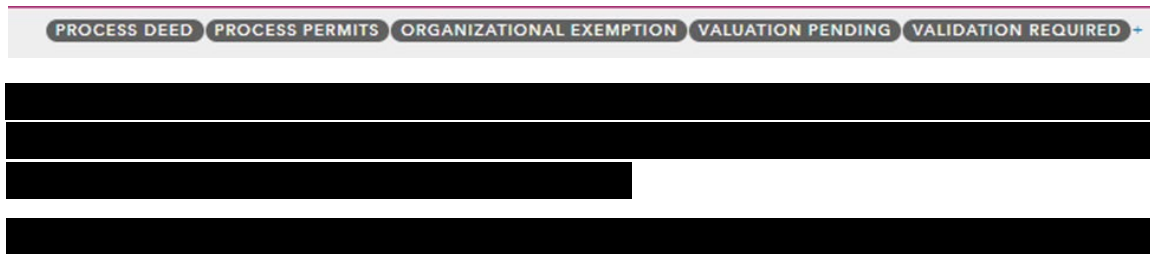
Genealogy | Permits | Accounts | Map | Snapshots | Workflows | Notes



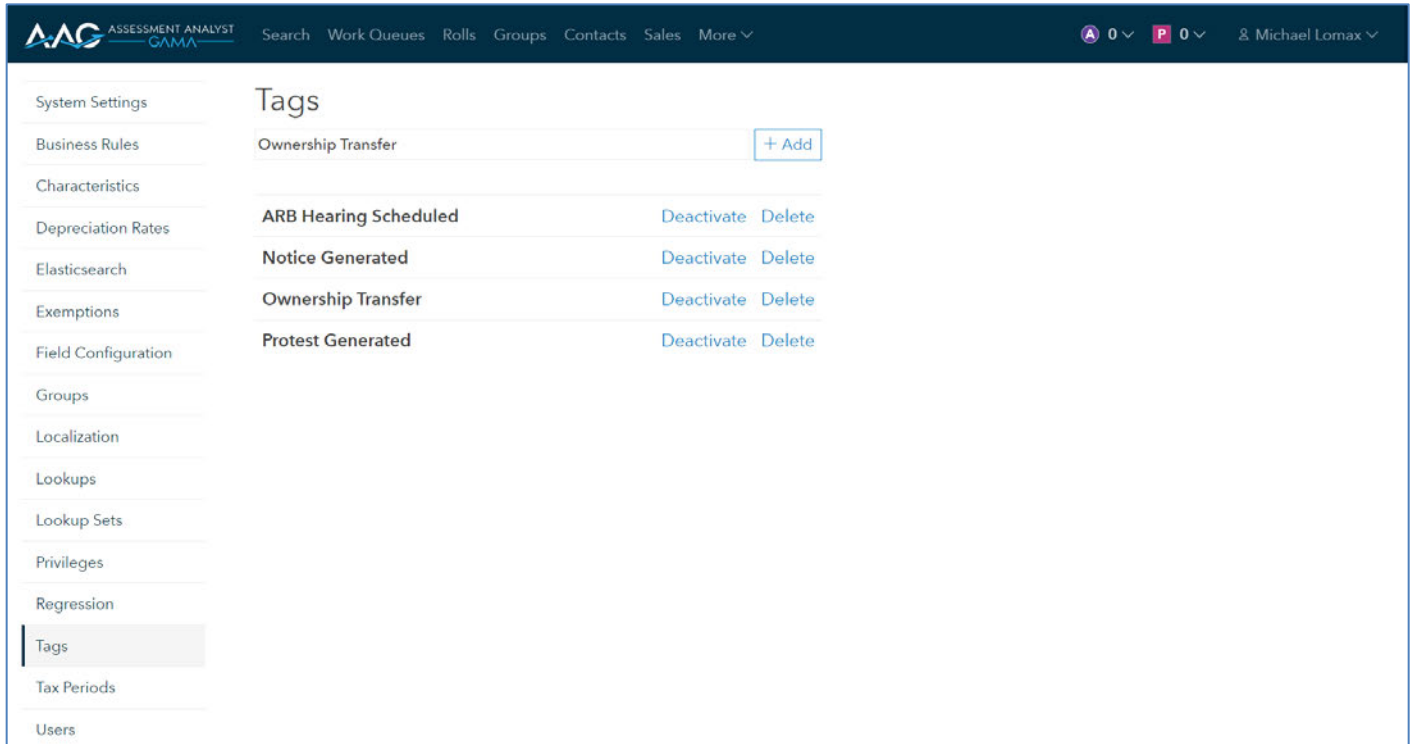
22034050A	
Tax Period 2025 NOC	Rollover
12/31/2024	
22034050A	
Tax Period 2024	Split
05/10/2024	
7 Records	
****READY FOR QC*** C 1/2 - JOB: 291297 PUC: 0819, Survey: 20230248968, cloned workflow because there is an APV	
Tax Period 2024	Rollover
12/31/2023	
22034050A	

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Event tracking using “System Tags”:



Event tracking using “User Tags”



Key Items

- All events can be tracked in multiple ways in AA GAMA – Evaluator.
- During our Business Analysis portion of the implementation and configuration we provide TAD our options and recommendations based on the use cases on which methodology is most applicable and helpful for TAD.
- AA GAMA - Evaluator allows full search, filter and audit capabilities so that events and changes to the event or status is tracked, recorded and identified within the application for the user and/or the managers.

Summary:

GAMA has deep and wide functionality to track all events required, including Workflows, System/User Tags, Genealogy, System/User Notes.

Description of AA GAMA - Evaluator Functionality

RFP Item: 12

RFP Table Title: Change Log Administration Capabilities and Advantages

Overall Description

AA GAMA - Evaluator features [REDACTED] that keeps track of all changes made within the application, ensuring data integrity and transparency. Each entry includes [REDACTED]. Additionally, [REDACTED] records who made each change, offering a complete and traceable log for auditing and compliance purposes.

AA GAMA – Evaluator Screenshot Examples

The screenshot displays a change log entry for the date 2024-06-01, performed by Brian Smith. The entry is titled "Audit Tax Period 2021" and includes a summary of changes: "1 ResidentialImprovement records modified 1 Parcel records modified". A specific change is detailed as "modified: ResidentialImprovement (101/BA - Building Area/Gross Livable Area)". Below this, a table shows the change in "Geography" from an original value to a current value of "Modified Geographic Data, Area: 12949.77". Another change is shown for "ManualArea" with an original value of 1.00. A third change is for "StyleCodeId" with a current value of "2 - Two Story". A second change log entry is shown for "modified: Parcel (0269000102901)", with a table showing "LivableArea" changing from an original value of 2400.00 to a current value of 3603.5.

Attribute	Original Value	Current Value
Geography		Modified Geographic Data, Area: 12949.77
ManualArea	1.00	
StyleCodeId		2 - Two Story

Attribute	Original Value	Current Value
LivableArea	2400.00	3603.5

Key Items

- Comprehensive Change Tracking: AA GAMA - Evaluator allows identification and tracking of field changes, including viewing all changes made and displaying before and after snapshots of modified fields, ensuring detailed monitoring and transparency of data modifications.
- External Change Tracking: The system tracks changes to records even when updates are performed outside the application, [REDACTED], ensuring all changes are captured accurately regardless of the method used.

- Customizable Change Reports: AA GAMA - Evaluator supports customizable change reports through the delivery of [REDACTED], including the ability to generate reports of changes made by specific users, providing flexible and detailed reporting options to meet various auditing and compliance needs.

Summary

- The non-editable audit records ensure that all events are recorded and tracked within the application, providing transparency around what was changed and by whom.
- All this information is included in the [REDACTED], enabling the creation of custom reports by event or user, enhancing data analysis and accountability.
- We are confident that AA GAMA - Evaluator will fully meet all the listed requirements, providing a complete and transparent solution for tracking and reporting data changes.

13. User Identification	Yes	No	Cost to Modify
13.1. Does a person need a user ID to access the system?	Yes		
13.2. Is a user ID password validated?	Yes		
13.3. Does the system support a universal login / SSO?	Yes		
13.4. Does the system allow the user to reset and/or recover password using security questions?	Yes		
13.5. Can a user account be created to only have specific functions available to them on the system?	Yes		
13.6. Are rights and functions on the system specified at the user level?	Yes		
13.7. Does the system allow for rights and functions by user groups?	Yes		
13.8. Does the system allow for selection of different databases to log into as in the case when using a training database and a live database?	Yes		
13.9. Can an appraiser be created to only change specific state codes?	Yes		
14. Appraisal Notice Automation	Yes	No	Cost to Modify
14.1. Does the system include a comprehensive 25.19 notice selection wizard?	Yes		
14.2. Can the 25.19 notice form be printed in-house?	Yes		
14.3. Can the 25.19 notice form be exported to a print file?	Yes		
14.4. Does the system include a comprehensive 25.192 notice selection wizard?	Yes		
14.5. Can the 25.192 notice form be printed in-house?	Yes		
14.6. Can the 25.192 notice form be exported to a print file?	Yes		
14.7. Does the system include a comprehensive 25.193 notice selection wizard?	Yes		
14.8. Can the 25.193 notice form be printed in-house?	Yes		
14.9. Can the 25.193 notice form be exported to a print file?	Yes		
14.10. Does the system allow for notices to be mailed by property type (i.e. Real property go first -vs- Personal Property)?	Yes		
14.11. Does the system allow for multi-property notices?	Yes		
14.12. Does the system allow printing notices for owners or agents or both?	Yes		
14.13. Does the system provide the ability to code a property that will FORCE a notice to be mailed to this property during the Appraisal Notice selection process?	Yes		
14.14. Does the system provide the ability to code a property that will EXCLUDE the property from being selected for notification during the May Notice selection process?	Yes		
14.15. Does the system create an event indicating that a notice was mailed to the property owner or agent?	Yes		
14.16. Does the system automatically store an image of the appraisal notice that was mailed to the property owner or the agent?	Yes		
14.16.1. Can the stored image then be re-printed?	Yes		
14.17. Does the system record "ARB values" system wide at the time the appraisal notices are printed to serve as a reference point for comparison during the protest period?	Yes		
14.18. Does the system allow for custom queries to be used to selectively code properties to FORCE a notice to be mailed to this property during the Appraisal Notice selection process?	Yes		
14.19. Does the system allow you to work in a Future Year layer while in the protest season?	Yes		
14.20. Does the system allow all accounts to be moved to the future year even before certification?	Yes		
14.21. Does the system allow Notices to be published electronically? (Where the taxpayer or Agent can view the Notice online)	Yes		
14.22. Does the system allow Notices to be published to the Property Search website?	Yes		

14.23. Does the system have an integrated email notice module or Microsoft 365 integration?	Yes		
15.Certified Appraisal Roll Automation	Yes	No	Cost to Modify
15.1. Does the system allow for certifying the roll in less than 5 hours?	Yes		
15.2. Does the system allow for generating and tracking a certified estimate of the roll?	Yes		
15.3. Does the system print certified totals by entity with a separate total for "Under ARB Review" items?	Yes		
15.4. Can the appraisal roll be printed in-house with duplex capability on laser printers?	Yes		
15.5. Can the appraisal roll be exported to an ASCII file for offsite printing?	Yes		
15.6. Can the appraisal roll be exported to a fixed-length file for taxing jurisdictions?	Yes		
15.7. Can the New Year creation and commencement of work begin immediately after certification?	Yes		
15.8. Does the system print the State Reports in Laser Forms?	Yes		
15.9. Does the system export to the EDS format for submission to the state?	Yes		
16.Appraisal Review Board Processing (ARB)	Yes	No	Cost to Modify
16.1. Does the system have an Appraisal Review Board package?	Yes		
16.2. Does the system allow for multiple protest reasons under a single protest?	Yes		
16.3. Does the system allow for multiple protesters under a single protest?	Yes		
16.4. Does the ARB package have barcode or QR scanning?		No	■
16.5. Does the system allow creating protests through a wizard?	Yes		
16.6. Does the system allow creating protests from an excel file?	Yes		
16.7. Does the ARB package provide scheduling tools?	Yes		
16.8. Can the user search by Property ID?	Yes		
16.9. Can the user search by Case ID?	Yes		
16.10. Can the user search by hearing date?	Yes		
16.11. Can the user search by appraiser?	Yes		
16.12. Can the user search by Status?	Yes		
16.13. Can the user search by Inquiry type?	Yes		
16.14. Can the user search by Date range?	Yes		
16.15. Can the user search by ARB Panel?	Yes		
16.16. Can the user search by status?	Yes		
16.17. Can the user search by Agent?	Yes		
16.18. Can the user update protest and hearing characteristics for multiple records from the search results?	Yes		
16.19. Does it automatically produce all the Comptroller required reports and surveys?	Yes		
16.20. Does the system automatically send all required text and email reminders and notices for hearings?		No	■
16.21. If a 25.25d motion is being submitted on an account that has already had a S&W or a Chapter 41 value hearing with a determination, will it record the submission, update to the appropriate case status?	Yes		
16.22. Can it auto validate and record, upon the filing of a 25.25 motion or 41.411, account specific year, year specific, delinquency date, tax payment date(s) and amount(s)?	Yes		
16.23. Can it determine if the 25.25 motion is timely and code the case appropriately?	Yes		
16.24. Can it calculate/estimate the undisputed amount of taxes based on information provided on the motion form?	Yes		
16.25. Can it determine if the undisputed amount of taxes have been paid timely and code accounts appropriately?	Yes		

16.26.	Prior to the scheduled hearing date, if the undisputed portion of taxes have not been timely paid, can it auto notify filer with correspondence designed to inform them of legal requirements necessary to proceed with a hearing?	Yes		
16.27.	As cases are being closed via a joint motion (JM), settlement & waiver(S&W) or hearing, by the authorized party, will it auto close all extraneous cases for those accounts filed by unauthorized parties?	Yes		
16.27.1.	Will it auto notify filing party, on all extraneous cases that account has been closed by authorized party?	Yes		
16.28.	If protests are submitted by multiple parties for the same grounds and the account has already been closed via JM, S&W or hearing, by the authorized party, will it record the submissions, create the cases, update cases with the correct closed case status and auto notify all filing parties, as cases are being created, that they will not be scheduled due to previous closure by authorized party?	Yes		
16.29.	Is the data in the protest filing screen/wizard in the same order as on the Notice of Protest?	Yes		
16.30.	Does the system record type of hearing requested (in-person, affidavit, telephone, video conference)?	Yes		
16.31.	Can the cases be filtered and sorted by requested hearing type?	Yes		
16.32.	Can hearing type be changed/updated in mass?	Yes		
16.33.	If errors (ex: wrong year, wrong agent number) occur when ARB cases are created, can the errors be corrected?	Yes		
16.33.1.	Can errors be corrected in mass?	Yes		
16.34.	Can a report be generated for all accounts ready for an Agreed Order?	Yes		
16.35.	Can a report be generated for all accounts ready for a Final Order?	Yes		
16.36.	Can Orders be generated in mass by Agent number?	Yes		
16.37.	At the account level, does the system track the call-in registration time for telephone hearing?	Yes		
16.38.	Does the system track when the telephone case is put into the panel room?	Yes		
16.39.	Does the system track when the hearing starts and stops?	Yes		
16.40.	At the account level, does the system track when the property owner/agent enters the waiting room for videoconference hearing?	Yes		
16.41.	Does the system track disconnections/interruptions?	Yes		
16.42.	Does the system track on whose end the disconnection/interruptions occurred?	Yes		
16.43.	Does the system track if an Affidavit/Unsworn Declaration has been uploaded to an account?	Yes		
16.44.	Does the ARB package keep track of all letters printed?	Yes		
16.45.	Does the ARB package allow for multiple properties which are part of the same economic unit on one protest?	Yes		
16.46.	Does the ARB package allow for multiple properties which are part of the same undivided interest on one protest?	Yes		
16.47.	Does the ARB package allow for multiple properties which are part of the same effective acreage group on one protest?	Yes		
16.48.	Does the ARB package allow for multiple properties which are part of the same homestead group on one protest?	Yes		
16.49.	Does the ARB package allow for scheduling for appraisers and ARB hearing?	Yes		
16.50.	Does the ARB package allow scheduling for offsite locations?	Yes		
16.51.	Does the ARB package keep the minutes of the meetings and the voting results and motions?	Yes		
16.52.	Can the user print a schedule for Appraiser meetings?	Yes		
16.53.	Can the user print a schedule for the ARB meetings?	Yes		
16.54.	Are all codes user defined and maintainable?	Yes		
16.55.	Is the ARB data kept by year indefinitely?	Yes		

16.56.	Does the ARB package capture digital audio (MP3 format) directly to the ARB record?	Yes		
16.57.	Does the ARB package support video conferencing?	Yes		
16.58.	Does the ARB package capture video directly to the ARB record?	Yes		
16.59.	Does the ARB package automatically generate a sales comp grid based on pre-defined parameters?	Yes		
16.60.	Does this sales comp grid also have automatic adjustments of sales comp to subject to come up with an indicated value?	Yes		
16.61.	Does the ARB package allow for a paperless ARB presentation showing protest information, sales comp grid, GIS comp grid, appraisal card etc.?	Yes		
16.62.	Does the ARB package allow for configuration of an evidence packet specific to property or protest characteristics?	Yes		
16.62.1.	If so, can the evidence packet be created for multiple protests at a time?	Yes		
16.62.2.	Can the ARB package determine which evidence to generate for each protest?	Yes		
16.63.	Does the ARB package allow for a paperless Taxpayer presentation?	Yes		
16.63.1.	If so, can the Taxpayer presentation be accessed from the same record where the ARB presentation is accessed?	Yes		
16.64.	Can the user quickly review prior year and current year property data and values side-by-side, along with percentage of change by year for hearing support?	Yes		
16.65.	Does the system provide real-time hearing schedule updates?	Yes		
16.66.	Does the system allow staff to page for assistance during a hearing?	Yes		
16.67.	Does the system allow non-value related protest determinations to be entered without changes to the notified or final market values?	Yes		
16.68.	Does the system support a tax payment status import?	Yes		
16.69.	Does the system support a tax office account live link from within the protest?	Yes		
17. Online Appeals		Yes	No	Cost to Modify
17.1.	Does the system allow taxpayers to file a protest online?	Yes		
17.2.	Does the property owner/agent Dashboard have a place for two way communication and does it capture and retain the communication?		No	█
17.3.	Can the user determine when the online system should be activated and deactivated based on the appeals cycle?	Yes		
17.4.	Does the online protest update the system without user intervention? (The user does not have to manually enter the protest filed online.)	Yes		
17.5.	Does the system allow The District evidence to be published online for the taxpayer?		No	█
17.6.	Does the system allow the taxpayer to submit evidence online?		No	█
17.6.1.	If so, is the evidence loaded into the system without user intervention?		No	\$0
17.6.2.	If so, are there security parameters in place to protect The District from viruses, large, or corrupt uploaded files?		No	█
17.6.3.	If so, is the deadline for uploading evidence user configurable based on hearing time or hearing status?	Yes		
17.7.	Does the system allow the taxpayer to schedule a hearing online from The District's configured available dates?		No	█
17.8.	Does the system allow the taxpayer to schedule a hearing by location?		No	█
17.9.	Does the system allow a taxpayer to reschedule a hearing online?		No	█
17.10.	Does the system allow a taxpayer to withdraw a protest online?		No	█
17.11.	Does the system allow The District to offer a settlement online?		No	█
17.11.1.	Does the system recommend a value adjustment based on the criteria used for comparable grids?		No	█

17.11.2. Does the system allow users to bulk review, apply, and offer adjustments based on comp grid values?	Yes		
17.11.3. Does the system collect the taxpayers opinion of value and compare it to other value sources?		No	█
17.11.4. Does the system allow a taxpayer to accept or reject an offer online?		No	█
17.11.5. If so, is the taxpayer decision loaded into the system without user intervention?		No	█
17.12. Does the system allow The District to notify the taxpayer of status or changes to the online protest?	Yes		
17.12.1. If so, is text message notification an option?	Yes		
17.13. Does the system allow non-value related settlements or withdrawals to be entered without changes to the notified values, final market values, or value-related protests or settlements?	Yes		
17.14. Does the system allow Agents to file a protest online?		No	█
17.15. Does the system allow The District evidence to be published online for the Agent?		No	█
17.16. Does the system allow the Agent to submit evidence online?		No	█
17.17. If so, is the evidence loaded into the system without user intervention?		No	█
17.17.1. Are there security parameters in place to protect The District from large or corrupt uploaded files?	Yes		
17.17.2. Does the system allow the Agent to schedule a hearing online from The District's configured available dates?		No	█
17.17.3. Does the system allow the Agent to schedule a hearing by location?		No	█
17.17.4. Does the system allow an Agent to reschedule a hearing online?		No	█
17.17.5. Does the system allow an Agent to withdraw a protest online?		No	█
17.18. Does the system allow The District to offer a settlement online to an Agent?		No	█
17.19. Does the system allow an Agent to accept or reject an offer online?		No	█
17.20. If so, is the Agent decision loaded in to the system without user intervention?		No	█
17.20.1. Does the system allow The District to notify the Agent of status or changes to the online protest?		No	█
18.Lawsuit/Arbitration Tracking	Yes	No	Cost to Modify
18.1. Does the system have a way to track lawsuits?	Yes		
18.2. Does the system display lawsuit data in a condensed format so statuses, changes, filing history, and account values can all be summarized on a single screen?	Yes		
18.2.1. Can changes be made from this screen?	Yes		
18.3. Does the system allow adding accounts in mass based on new petitions?	Yes		
18.4. Does the system have an evidence tool for lawsuits?	Yes		
18.4.1. Does this tool have similar functionality to the ARB evidence tool?	Yes		
18.4.2. Does this tool allow for importing the evidence from the ARB hearing?	Yes		
18.5. Does the system track court information?		No	█
18.6. Does the system track lawsuit cost information?	Yes		
18.7. Does the system have a way to track jurisdictional flaws?	Yes		
18.8. Does the system have a way to track protest reason/type?	Yes		
18.9. Does the system have a way to track plaintiff name?	Yes		
18.10. Does the system have a way to track the cause number?	Yes		
18.11. Does the system have a way to track date filed, date served, final delivered date, amended date, and original answer filed date?	Yes		
18.12. Does the system track the defendant's attorney and the plaintiff's attorney?	Yes		
18.13. Does the system track notice value and ARB value?	Yes		

18.14. Does the system track the tax status and date paid?	Yes		
18.15. Does the system track the agreed value and approved agreed judgement dates?	Yes		
18.16. Does the system track the disposition status, conformed date, and closed date?	Yes		
18.17. Does the system track the category granted for current and prior year?	Yes		
18.18. Does the system track the total litigated value for current and prior year?	Yes		
18.19. Does the system track the final value and net difference for current and prior year?	Yes		
18.20. Does the system have a tax entity notified field?	Yes		
18.21. Does the system have a problem/comments field?	Yes		
18.22. Does the system track letters for flagged/closed accounts?	Yes		
18.23. Does the system generate letter to the entities for flagged accounts?	Yes		
18.24. Does the system store the beginning value and the ending value for the lawsuit?	Yes		
18.25. Does the system show the value lost by entity?	Yes		
18.26. Does the system allow images to be attached to the lawsuit?	Yes		
18.27. Does the system have letter processing for lawsuits?	Yes		
18.28. Does the system automatically generate letters based on specific events?	Yes		
18.29. Does the system have a way to track arbitration cases?	Yes		
18.30. Does the system have a way to track arbitration case numbers?	Yes		
18.31. Does the system have a way to track the individual's (owner and/or agent) name that filed the arbitration case and their contact information?	Yes		
18.32. Does the system have a way to track the arbitration value request?	Yes		
18.33. Does the system have a way to track the arbitration fee that was paid?	Yes		
18.34. Does the system have a way to track comptroller arbitration acceptance, denial, and withdraw letters and dates?	Yes		
18.35. Does the system have a way to track and calculate an arbitration 45-day settlement window deadline from the date of the comptroller's acceptance letter?	Yes		
18.36. Does the system have a way to track tax status with date paid?	Yes		
18.37. Does the system have a way to track assigned arbitration and arbitrator information (name, mailing address, phone number, e-mail address)?	Yes		
18.38. Does the system have a way to track arbitration evidence deadlines, hearing dates, times, and hearing type (teleconference or in person, and informal in person then the location)?	Yes		
18.39. Does the system have a way to generate arbitration evidence cover letters using account and arbitrator information?	Yes		
18.40. Does the system track the arbitrator contact information?	Yes		
18.41. Does the system allow for different owner contact info to be used for the arbitration vs all other communications?	Yes		
18.42. Does the system show arbitration information?	Yes		
18.43. Can a user search for arbitration records by property type?	Yes		
18.43.1. Property Designation?	Yes		
18.43.2. Property Use?	Yes		
18.44. Does the system track value changes?	Yes		
18.45. Does the system have letter processing for arbitration?	Yes		
18.46. Does the system have an evidence tool for arbitrations?	Yes		
18.46.1. Does the system allow for configuration of a standard evidence packet for arbitration, to meet USPAP appraisal report guidelines?	Yes		
18.46.2. Does this tool have similar functionality to the ARB evidence tool	Yes		
18.46.3. Does this tool allow for importing the evidence from the ARB hearing?	Yes		
18.47. Does the system allow images for lawsuit and arbitration?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 13

RFP Table Title: User Identification Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers [REDACTED], ensuring seamless access to daily operations through one username and password. The application provides granular control over privileges and access at both the group and user levels, allowing tailored permissions for each function. Users or groups can perform tasks, view data, or edit data based on their assigned privileges, ensuring precise access management.

AA GAMA - Evaluator Screenshot Example

The screenshot displays two side-by-side panels from the AA GAMA - Evaluator application. The left panel, titled 'All Privileges 83', shows a list of 25 privileges with their descriptions. The right panel, titled 'Groups', shows a configuration screen for user groups, with 'Appraiser' and 'System Administration' listed as available groups.

Privilege	Description
ActivateParcel	Grant the Ability to activate Parcel after a Split or a Combine
AddContact	Grant the ability to add a new Contact in the Contacts tab to the list of Contacts
AdministrativeLawCourt	Grants the ability to enter an override type of Administrative Law Court
AllocateEconomicUnit	Grant the ability to manually Edit allocated value to the Economic Unit
AppraiserOverride	Grants the ability to enter an override type of Appraiser Override
AssessorLevelAppeal	Grant the ability to enter an override type of Assessor Level Appeal Decision
AssessorManualOverride	Grant the ability to enter an override type of Assessor Manual Override
BoardofAppeals	Grants the ability to enter an override type of Board of Appeals
BusinessRules	Grant the ability to edit Business Rules
ChangeDefaultValuationApproach	Grant the ability to change the valuation Approach for a Parcel
ChangeMcr	Grants ability to change MCR number
Characteristics	Grant the ability to edit Characteristics
ClaimCorrection	Grant the ability to enter an override type of Notice of Claim/Notice of Proposed Correction
CreateAssessmentRoll	Grant the ability to Create an Assessment Roll on the Rolls Tab
CreatePublicSearch	Grant the ability to save a user search as public
DecisionRollOver/Value	Grant the ability to modify or override an override type of Appeal Decision RollOver
DeleteAssessmentRoll	Grant the ability to delete an Assessment Roll in the Rolls Tab
DeleteContact	Grant the ability to delete a Contact in the Contacts tab
DeleteContactAddress	Grant the ability to delete an address from a contact
DeleteNote	User is allowed to delete a note beyond the proscribed period, and regardless of who initially created it
DeletePublicSearches	Grant the ability to delete any user search saved as public
DeleteSitus	User is allowed to remove a parcel's SITUS address
DeleteValuationOverride	Grants ability to delete a valuation override for a parcel.
DepreciationRate	Grant the ability to edit Depreciation Rate
DissolveApartmentComplex	Grant the ability to dissolve an Apartment Complex

Access Control/Privileges interface

Key Items

- User Authentication and Security: AA GAMA - Evaluator requires a [REDACTED]
- Tailored Access Control: The system enables the creation of user accounts with specific functions, rights, and functions defined at both the user and user group levels, ensuring tailored access control.
- Database Selection and Specific Permissions: AA GAMA - Evaluator allows users to select [REDACTED]

Summary

- Leveraging Microsoft Active Directory, AA GAMA - Evaluator provides seamless access to the application, consistent with users' day-to-day operations through a single username and password.
- Every function and feature within the application can be tied to specific permissions at both the user and group levels, ensuring users have access only to the tasks they are required to perform.
- We are confident that AA GAMA - Evaluator will fully meet all the listed requirements, offering robust and precise access management.

Description of AA GAMA - Evaluator Functionality

RFP Item: 14

RFP Table Title: Appraisal Notice Automation Capabilities and Advantages

Overall Description

AA GAMA - Evaluator, integrated with [REDACTED] offers the ability to create and process a variety of forms and notices in bulk, depending on the required form. These notices can be printed in-house or exported to a print vendor, with workflows reflecting sent notices and storing them for future reference. The application also supports multiple assessment roll years, allowing users to maintain a working assessment roll while simultaneously working in a future or past assessment roll year.

AA GAMA - Evaluator Screenshot Example

The screenshot displays the AA GAMA - Evaluator application interface. At the top, there are filters for Assessment Year (2022), Vintage (Test), Owner (REDACTED), Muni Code (All), and Roll Number (All). Below these are options for Show Or Hide (Show) and Notice of Assessment Date (NULL). A navigation bar includes back, forward, and search icons, along with a 'Find | Next' search field. The main content area shows a detailed notice for a property with the following information:

DIPAUID/Roll:	Assessed Person:	Notice of Assessment Date:
SIMS ID:	Date Sent:	2023
Mailing Address:	Tax Year:	Test
	Vintage:	Test
	School Support:	Public: 0.00%
		Separate: 0.00%
		Undeclared: 0.00%

Legal Description: Mer 4 Rge 12 Twp 26 Sec 24 NW 11 LSD 11 Plan Block Lot

Parcel Size (Acres):

Assessment Class	Property Description	Tax Status	Land	Improvements	Total
Non Residential - 2	NR-D	Taxable	\$0	\$51,909	\$51,909
Machinery and Equipment - 4	ME-D	Taxable	\$0	\$215,341	\$215,341
Total Assessment:					\$267,250

At the bottom, there are two sections: 'A COMPLAINT ABOUT AN ASSESSMENT FOR DESIGNATED INDUSTRIAL PROPERTY MUST BE FILED ON OR BEFORE' and 'THIS DOCUMENT IS ISSUED BY:'. Both sections contain redacted information.

Example of a notice that can be run in bulk or for an individual property. This then can be used to create a workflow for tracking and recording the notice sent.

Key Items

- Comprehensive Notice Management: AA GAMA - Evaluator includes the ability to have multiple options for notices that can be selected based on different characteristics on the parcel. All these forms can be printed in-house or exported to a print file. The system supports multi-property notices, coding properties to force or exclude notices, and mailing notices by property type.
- Detailed Tracking and Storage: The system creates events indicating when notices are mailed and automatically stores images of the appraisal notices, which can be reprinted as needed. It records "ARB values" at the time of printing for reference during the protest period and allows custom queries to selectively code properties for forced mailings.
- Advanced Features and Integration: AA GAMA - Evaluator supports working in a future year layer during the protest season, moving all accounts to the future year before certification, and publishing notices electronically that can be made available on a Property Search website.

Summary

- AA GAMA - Evaluator, integrated [REDACTED], offers the flexibility to create and select different notices as needed, allowing bulk processing for efficiency. Notices can be printed in-house or exported to a print vendor, ensuring versatile output options.
- All sent notices can trigger a workflow for tracking and future reference, maintaining a detailed record of communications. The system also supports working in multiple assessment years simultaneously, providing robust functionality for managing assessment rolls.
- We are confident in our ability to meet this requirement, as AA GAMA - Evaluator's comprehensive features ensure seamless notice management, efficient processing, and event tracking.

Description of AA GAMA - Evaluator Functionality

RFP Item: 15

RFP Table Title: Certified Appraisal Roll Automation Capabilities and Advantages

Overall Description

AA GAMA - Evaluator uses a concept of a 'working assessment roll'. All parcel/accounts in AA GAMA - Evaluator are included in the 'working assessment' roll and as data and values are updated the 'working roll' is updated. [REDACTED]

[REDACTED] The certified assessment roll can be reported from, exported to various file formats, printed, or exported to an external vendor for offsite printing.

AA GAMA - Evaluator Screenshot Example

Actions	System...	Roll Name	Created	Status	Count
View Export		Working 2024	Current	Open	1899191
View Export	<input type="checkbox"/>	✓ 2024 Final Feb Abstract	01/28/2024 8:44 AM	Done	1898121
View Export	<input type="checkbox"/>	✓ 2024 Abstracts Feb 12162023	12/18/2023 7:00 PM	Done	1861671
View Export	<input type="checkbox"/>	✓ 2024 Abstracts February	12/02/2023 9:31 AM	Done	1840664
View Export	<input type="checkbox"/>	✓ Notice of Value 2024	01/24/2023 6:19 PM	Done	1689441
View Export	<input type="checkbox"/>	✓ 2024 NOV CLS3	01/17/2023 10:14 AM	Done	1689438
View Export	<input type="checkbox"/>	✓ NOV Test 20230111	01/11/2023 7:25 AM	Done	1598781

Create and Certify Roll from 'Working Roll

Key Items

- AA GAMA - Evaluator allows a user with elevated privileges to run and certify the assessment roll in under 5 hours.
- Certified roll can be exported to various file formats or an external vendor for printing purposes.
- Certified totals can be reported on by entity or by other criteria as necessary.

Summary

Certification of rolls, reporting, exporting and printing requires little configuration to meet the requirements.

Description of AA GAMA - Evaluator Functionality

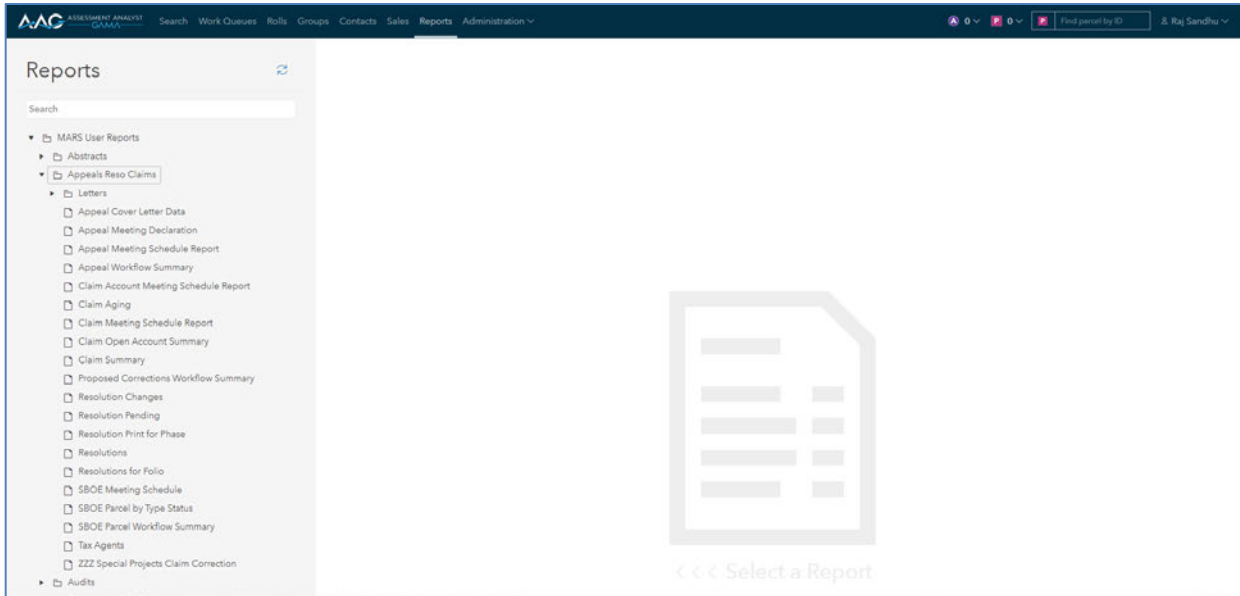
RFP Item: 16

RFP Table Title: Appraisal Review Board Processing (ARB) Capabilities and Advantages

Overall Description

- AA GAMA - Evaluator report functionality can be configured to produce reports for ARB using a defined "report template" which is executed and populated with requisite data, attributes & characteristics from GAMA.
- Integration with [REDACTED] also allows video conferencing and minutes recorded for hearings when used during the hearing. Integration with [REDACTED] allows scheduling of hearings, locations and parties when used in conjunction with the GAMA Workflow Engine – Appeal Workflows.

AA GAMA - Evaluator Screenshot Examples



Report Interface

Status	Created	Assessment Year	Parcels	Snapshots	NOPC Mail Date	Certified Tracking #
Approved	07/25/2023 10:34 AM	2023	50134286 - 2023	50134286 - 2023		
Approved	07/24/2023 1:19 PM	2023	50134288 - 2023	50134288 - 2023		
Appraiser Workup	07/24/2023 12:49 PM	2023	50134287 - 2023	50134287 - 2023		
Pending Approval	07/24/2023 8:06 AM	2020-2022	50161451 - 2021 [+2]	50161451 - 2020 [+2]		
Appraiser Workup	07/21/2023 1:22 PM	2023	50150002G - 2023	50150002G - 2023		
Approved	07/21/2023 12:32 PM	2022-2023	21674177 - 2023 [+1]	21674177 - 2022 [+1]		
Approved	07/21/2023 6:23 AM	2021-2023	50198380 - 2022 [+2]	50198380 - 2021 [+2]		
Approved	07/20/2023 2:46 PM	2020-2023	50407383 - 2022 [+3]	50407383 - 2020 [+3]	07/27/2023	

Status Reporting

Key Items

- Hearing recordings, logins, notations of time and transcripts can be completed through the integrated use of [REDACTED] scheduling
- All fields identified in this requirement can be configured to be “searchable” as they would be loaded and maintained as “Characteristics” attached to the Parcel or Appeal Workflow based on configuration Business Analysis with TAD.

- Reports can also be configured to deliver the specific requirements whether they are templates or dynamic reports using [REDACTED]

Summary

There are many “detailed” requirements noted within this section of the RFP. Through Business Analysis with the TAD project team, we will make recommendations on which pieces of AA GAMA - Evaluator functionality are best suited to provide the functionality and we will configure same to deliver that functionality.

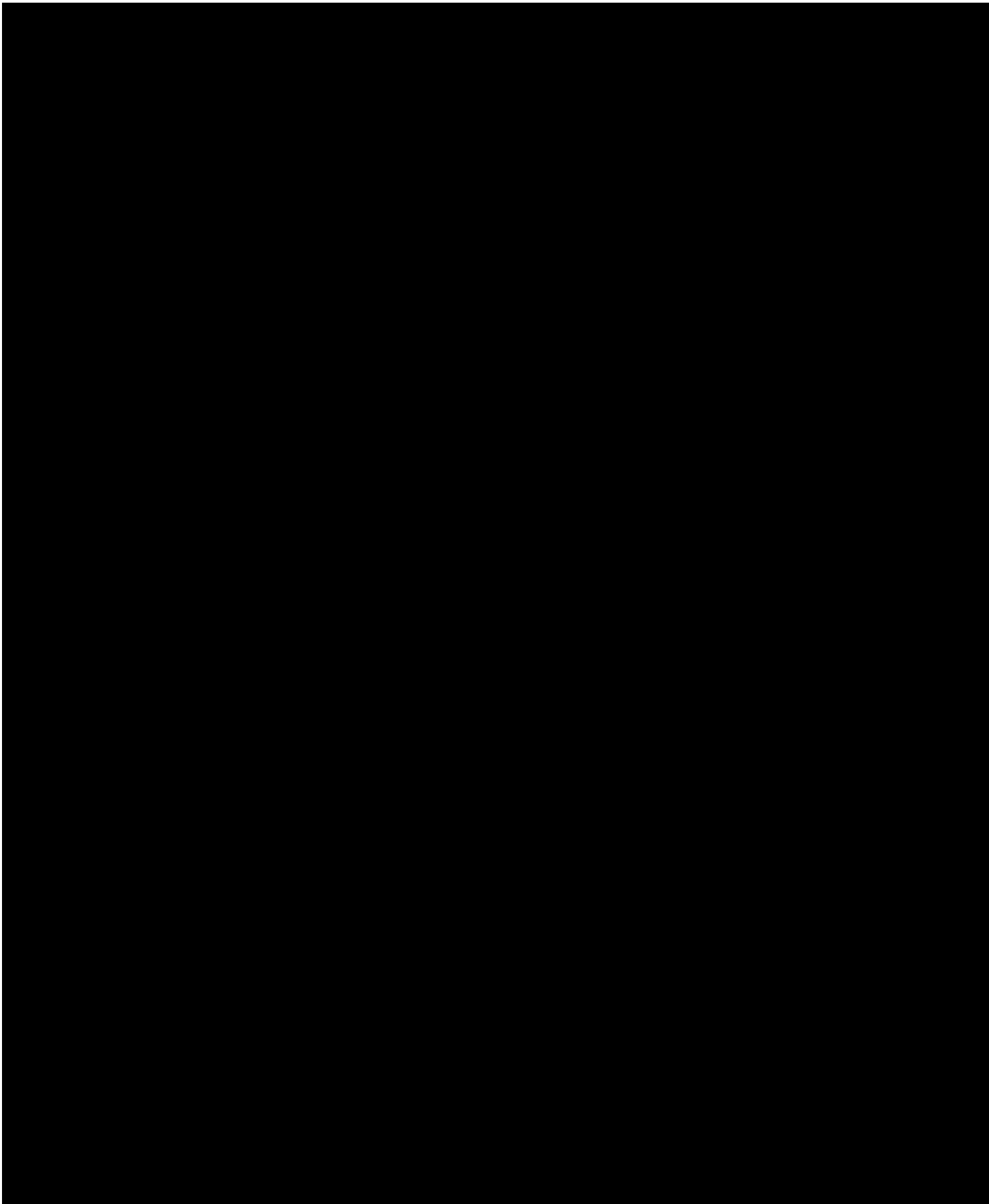
Description of AA GAMA - Evaluator Functionality

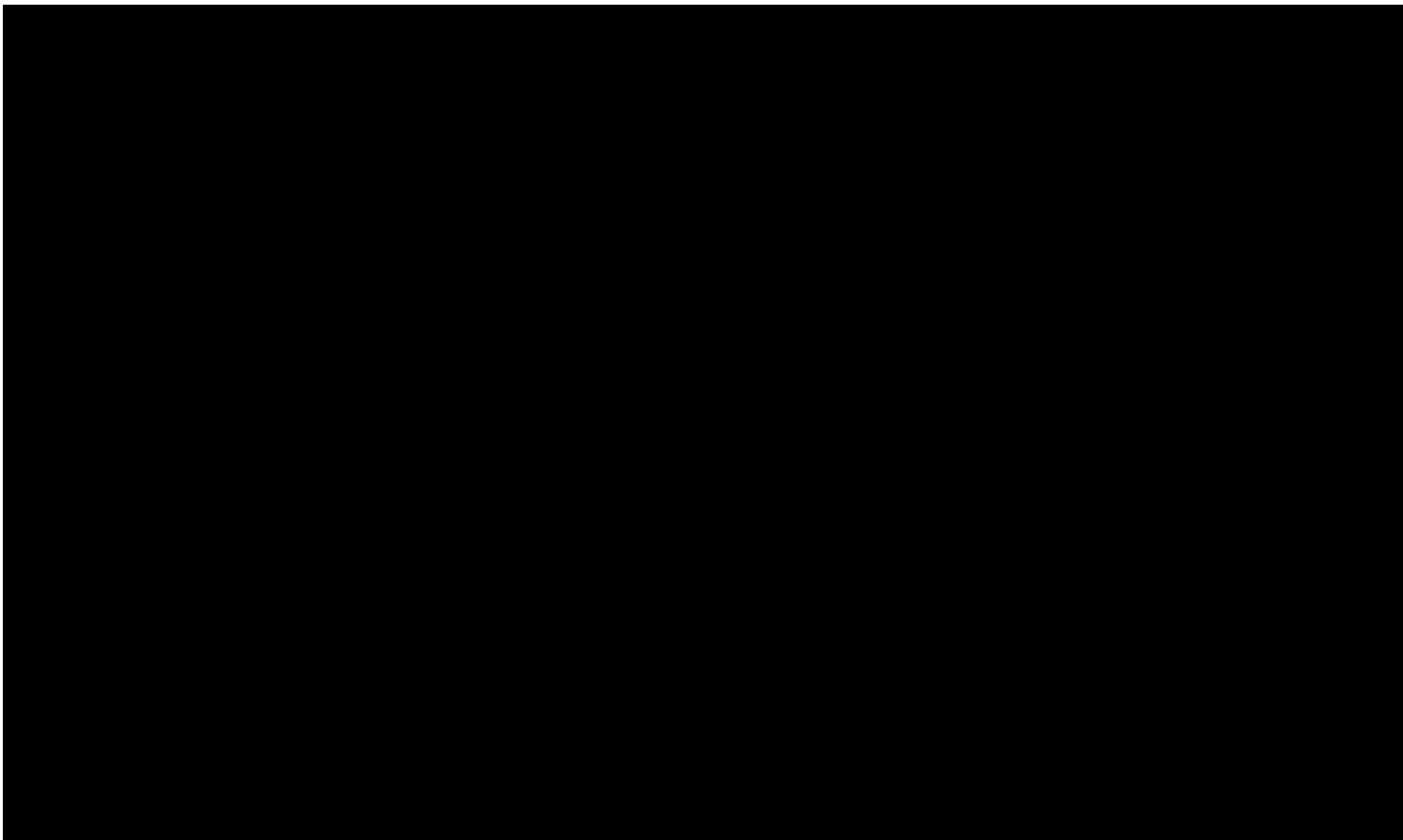
RFP Item: 17

RFP Table Title: Online Appeals Capabilities and Advantages

Overall Description

- AA GAMA - Evaluator provides the ability for property owners or their designated representative to submit a request for review, appeal, submission of self-reporting forms, provision of notices etc. of an owner’s parcel/account details.
- AA GAMA - Evaluator can leverage the Esri platform for on-line capability such as forms, applications from the property owners, it allows administrators to generate various types of forms ([REDACTED] reports, which in turn can be made accessible to the public through an [REDACTED] [REDACTED]
- AA GAMA - Evaluator can auto-generate these reports via a scheduled job and push them to a known location.
- Through implementation and configuration, we can deploy [REDACTED] [REDACTED]
- ArcGIS Hub is an easy-to-configure community engagement platform that organizes people, data, and tools through information-driven initiatives. Organizations of any type and any size, including government agencies, nonprofit groups, and academia, can maximize engagement, communication, collaboration, and data sharing using the [REDACTED] initiative-based approach.
- With [REDACTED], organizations can leverage their existing data and technology and work together with internal and external stakeholders to track progress, improve outcomes, and create vibrant communities.
<https://www.esri.com/en-us/arcgis/products/arcgis-hub/overview>
- Online Appeals can be handled via many Online Dispute Resolution capabilities as was built for the British Columbia Property Assessment Appeal Board (separate entity from BC Assessment) which interfaces with BC Assessments systems.
<https://www.assessmentappeal.bc.ca/>
<https://paab-odr.ca/home>





[Tips on How to Resolve your appeal](#)

Key Items

- AA-GAMA Evaluator can leverage Tarrant County's already existing Esri Enterprise Agreement to [REDACTED]

- [REDACTED]
- Online form processing via web submissions is also currently being worked on within our GAMA product road map for initial release Q4 of this year, Tarrant County also has ability to provide influence on the features during the implementation window.
- The use of AA-GAMA Evaluator as your solution for Real Property / Account valuation allow you to leverage the complete Esri platform as the world leader in GIS technology to deliver enhanced functionalities available in the Esri platform.
- Online Dispute Resolution (ODR) capabilities can be added to AA-GAMA Evaluator and the final solution(s) used will be based on our Business Analysis with the TAD team during the implementation phase of the project.

Summary

- TAD is positioned well with a current Esri Enterprise Agreement to combine AA GAMA - Evaluator functionality with the entire Esri platform.
- Real Estate valuation is location centric and as such when utilizing AA GAMA - Evaluator with the additional Esri platform application stack, returns the best-in-class solution for TAD.
- Online Dispute Resolution capabilities will be added to AA-GAMA Evaluator based on a complete business analysis with TAD staff on workflows, document exchanges and functionalities required during implementation.

Description of AA GAMA - Evaluator Functionality

RFP Item: 18

RFP Table Title: Lawsuit/Arbitration Tracking Capabilities and Advantages


Overall Description

AA GAMA – Evaluator’s workflow engine can be configured to meet Appeal requirements. The workflow tracks stages, tasks, document exchanges, inquires, hearings, evidence, next steps among many other items that can be configured to manage the appeal/inquiry from receipt to completion including hand offs and approvals based on roles assigned. In addition, specific reports and report templates can be configured to provide evidence packages.

AA GAMA - Evaluator Screenshot Examples of Workflow Engine

Issue Date	Extension Date	Meeting Date/Time	Meeting Location	NIC Mail Date	OnBase	ID Number
...	month/day/y...	month/day/year		month/day/y...		
					OnBase	357
					OnBase	356
					OnBase	354
					OnBase	353
					OnBase	352
					OnBase	351
					OnBase	350
Overdue					OnBase	349
Overdue		08/30/2023 9:30 AM	PHONE		OnBase	348
Overdue					OnBase	347

Workflow Tasks		Appeal Account					
Group	Assigned To	Assigned	Status	Created	Assessment Year	Ac	
<input type="checkbox"/> Unassigned	Rajaas Tahir	01/12/2024 6:19 PM	WORK	Entered	01/12/2024 6:19 PM		
<input checked="" type="checkbox"/> AU1	<input type="radio"/> Unassigned	09/01/2023 9:10 AM	WORK	Entered	09/01/2023 8:01 AM	2023	
<input checked="" type="checkbox"/> AU1	<input type="radio"/> Unassigned	09/01/2023 9:10 AM	WORK	Entered	09/01/2023 8:01 AM	2023	
<input checked="" type="checkbox"/> AU1	<input type="radio"/> Unassigned	09/01/2023 9:10 AM	WORK	Entered	09/01/2023 8:01 AM	2023	
<input checked="" type="checkbox"/> AU1A	<input checked="" type="radio"/> MICHELLE DARBY	09/01/2023 10:52 AM	WORK	Entered	09/01/2023 7:55 AM	2023	
<input checked="" type="checkbox"/> AU1A	<input checked="" type="radio"/> MICHELLE DARBY	09/01/2023 10:52 AM	WORK	Entered	09/01/2023 7:46 AM	2023	
<input checked="" type="checkbox"/> AU1A	<input checked="" type="radio"/> MICHELLE DARBY	09/01/2023 10:53 AM	WORK	Entered	09/01/2023 7:46 AM	2023	
<input checked="" type="checkbox"/> AU1A	<input checked="" type="radio"/> MICHELLE DARBY	09/01/2023 10:53 AM	WORK	Entered	09/01/2023 7:35 AM	2023	

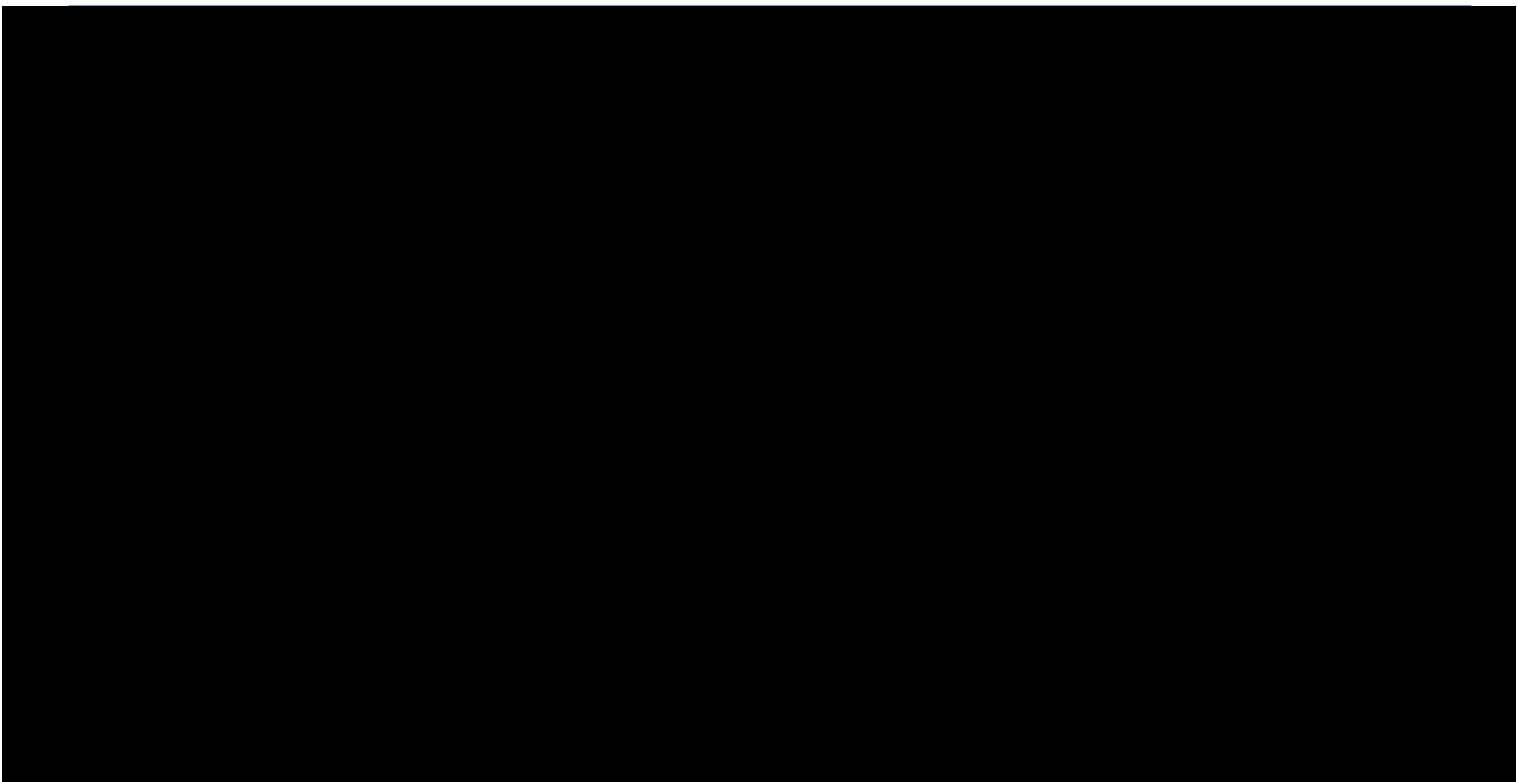

 Search Work Queues Rolls Groups Contacts Sales More

A 0 P 0 Find parcel by ID Michael Lomax

Now in (All) Today

Task: Appeal Account Completion Status: In Queue Folio ID: Find parcel by ID 1 ITEMS SELECTED

Account	Appeal Number	Account Type	Received Date	Entered Date	Due Date	
	197					
A 0004663	196	Commercial	08/25/2023	09/01/2023	09/14/2023	Overdue P
A 0004665	195	Commercial	08/25/2023	09/01/2023	09/14/2023	Overdue P
A 0004662	194	Commercial	08/25/2023	09/01/2023	09/14/2023	Overdue P
A 9023187	193	Commercial	08/30/2023	09/01/2023	09/19/2023	Overdue E
A 0002555	192	Commercial	08/29/2023	09/01/2023	09/18/2023	Overdue C
A 9392959	191	Commercial	08/29/2023	09/01/2023	09/18/2023	Overdue C
A 9037351	190	Commercial	08/29/2023	09/01/2023	09/18/2023	Overdue C



AAC ASSESSMENT ANALYST GAMA Search Work Queues Rolls Groups Contacts Sales More A 0 P 0 P Find parcel by ID & Michael Lomax

Task: Appeal Account Completion Status: In Queue Folio ID: Find parcel by ID 1 ITEMS SELECTED

Total Owner's Opinion - LPV	Total Owner's Opinion Exemp	Total Owner's Opinion Legal C	OnBase	Selected Owner Name	Rejected Mail Date
					month/day/y...
			OnBase	Associate Contact	
0	0	0	OnBase	Associate Contact	
0	0	0	OnBase	Associate Contact	
0	0	0	OnBase	Associate Contact	
0		1/17	OnBase	Associate Contact	
		1.13/17	OnBase	Associate Contact	
		1.13/17	OnBase	Associate Contact	
		1.13/17	OnBase	Associate Contact	
3,937,464		1/17	OnBase	Associate Contact	

Key Items

- Workflow engine in GAMA provides the necessary functionality for the requirements from high level overviews (dashboards for managers) to specific tasks assigned to teams or individuals.

- Users can work the appeal within the workflow dashboard directly and all statuses update live for all users with specific levels of configured access.
- Users can also work the appeal within the “Work” Modal to update required information.

Summary

Workflows within AA GAMA - Evaluator can be configured to meet or exceed all Appeal requirements.

19. Inquiry Tracking	Yes	No	Cost to Modify
19.1. Does the system have a way to track general inquiries from property owners or inquiries?	Yes		
19.2. Are the inquiries stored by year in chronological order?	Yes		
19.3. Can these inquiries be scheduled by appraiser?	Yes		
19.4. Can these inquiries have the status changed in mass?	Yes		
19.5. Does the system store the beginning value and the ending value for the inquiry?	Yes		
19.6. Does the system allow creating protests through a wizard?	Yes		
19.7. Does the system use an automated letter processing system to print personalized form letters to the property owner or agent?	Yes		
19.8. Does the system automatically save an image of any letter mailed to property owner or agent?	Yes		
19.9. Does the system support letter processing "templates" that allow for the routing of letters and forms to specific printers in the office?	Yes		
19.10. Does the system track events related to a particular inquiry?	Yes		
19.11. Does the system allow for any windows object be attached to an inquiry event? Windows objects such as video clips, audio recordings, etc.?	Yes		
19.12. Does the system track a change log associated with the inquiry tracking system?	Yes		
19.13. Does the system allow for document images to be scanned or attached into an inquiry record?	Yes		
19.14. Is the system able to automatically generate a sales comp grid with automatic adjustments and weighted to the subjects characteristics?	Yes		
19.15. Is the system able to automatically generate an equity comp grid with automatic adjustments and weighted to the subjects characteristics?	Yes		
19.16. Does the system allow for a search for inquiry records?	Yes		
19.17. Can this search be customized by date, appraiser, status, sign-in time etc..?	Yes		
19.18. Does this search allow configuration to automatically refresh at a pre-defined interval for monitoring purposes?	Yes		
19.19. Does the system allow search by inquiry reason?	Yes		
19.20. Does the system have any reports associated with the inquiry tracking system?	Yes		
19.21. Does the system import or link notes and images from the inquiry into the protest?	Yes		
20. Configurable Active Reports	Yes	No	Cost to Modify
20.1. Does the application have a way to configure a generic query, stored procedure or view and display the results in a columnar window within the application?	Yes		
20.1.1. Can these be scheduled to run at a future time?	Yes		
20.2. Does this allow for user assignment configuration?	Yes		
20.3. Does this allow for reports on arbitrations?	Yes		
20.4. Does this allow for reports on Lawsuits?	Yes		
20.5. Does this allow for reports on properties valued with Marshall & Swift?	Yes		
20.6. Does this allow for automatic time-interval refresh configuration?	Yes		
20.7. Does this allow for mass update of accounts?	Yes		

Description of AA GAMA - Evaluator Functionality

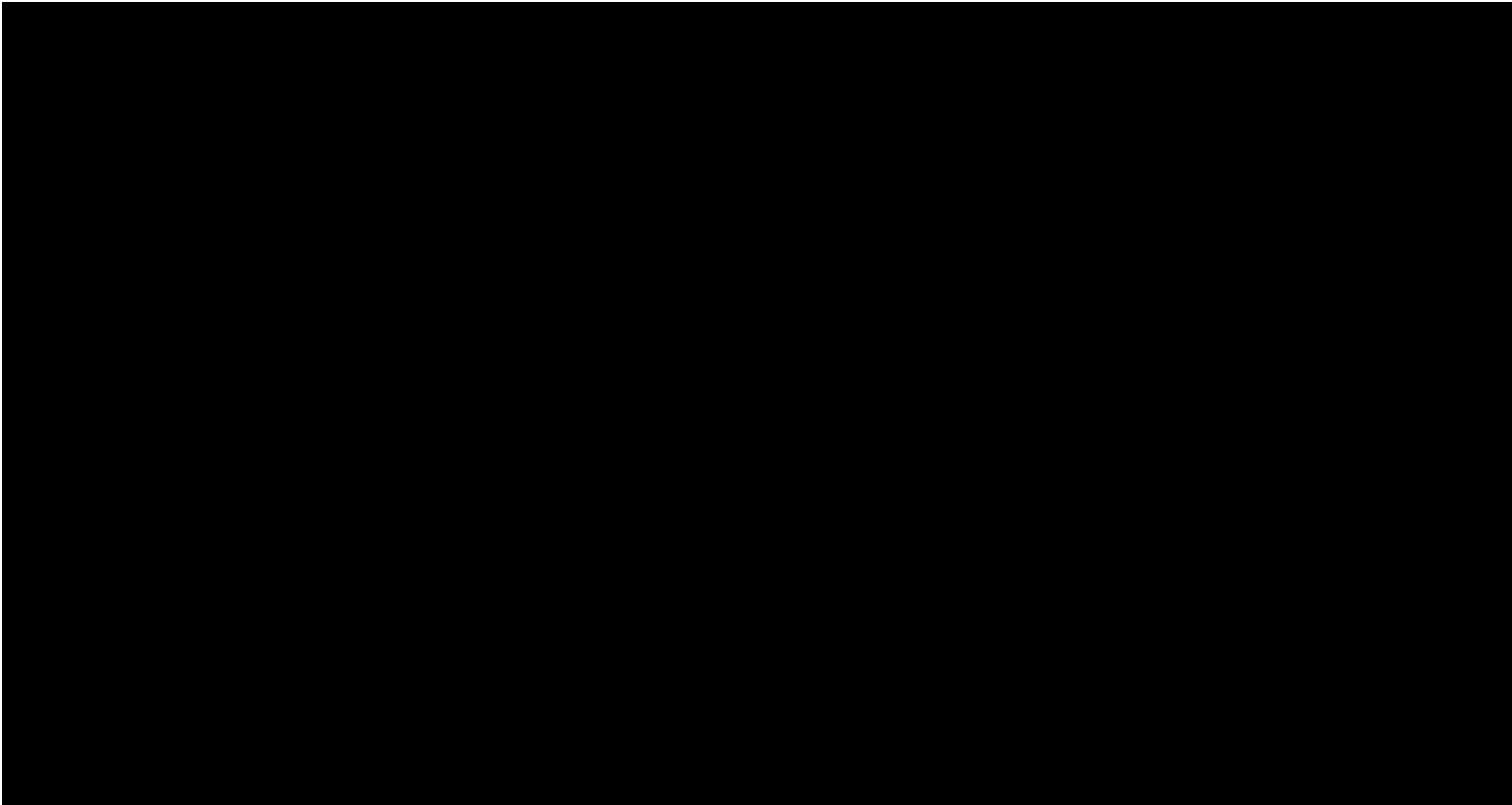
RFP Item: 19

RFP Table Title: Inquiry Tracking Capabilities and Advantages

Overall Description

Inquiry tracking in AA GAMA - Evaluator is best done “en-mass” within the Workflow Engine where inquiries can be logged, tracked and worked to resolution. The Workflow Engine also provides the management team an insight into where they are occurring, a summary of the issues and the stage of the workflow they currently sit.

AA GAMA - Evaluator Screenshot Examples



Key Items

- Workflows can be configured in AA-GAMA Evaluator for a variety of tasks such as inquiries, appeals, case resolution, document exchanges etc.
- Workflows track receipt, steps, actions required, status, person(s) assigned, roll numbers, steps and methods to resolve the event from start to finish.

Summary

AA-GAMA Workflow Engine is configurable by the implementation team and subsequently by the users to build logical steps to resolve all events including validation, hand offs, exchanges, dates and deadlines.

Description of AA GAMA - Evaluator Functionality

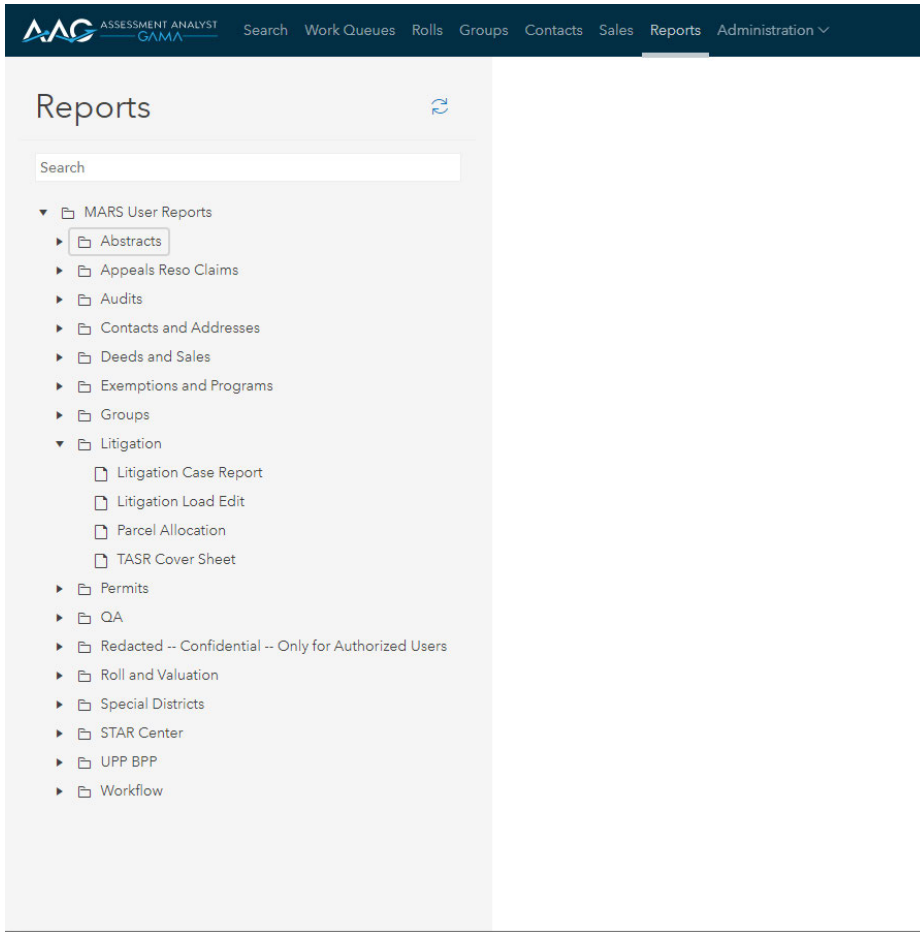
RFP Item: 20

RFP Table Title: Configurable Active Reports Capabilities and Advantages

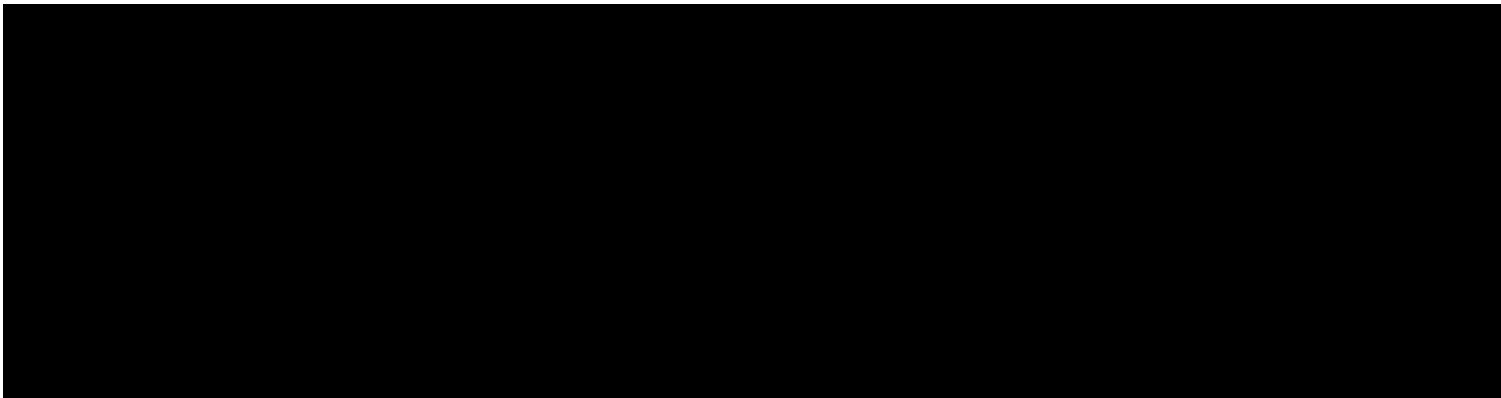
Overall Description

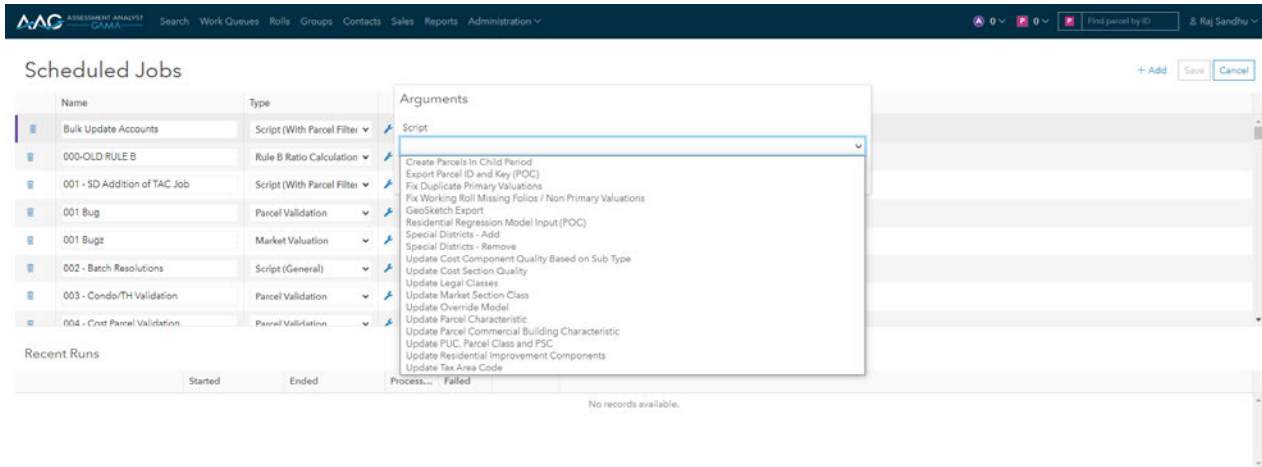
AA GAMA - Evaluator leverages a reporting database that is refreshed nightly for reporting and query purposes. The application provides a window within the application to access these reports. Reports are configured through the implementation process and all AA GAMA - Evaluator data fields are available to be reported on. Ad-hoc reports can be created at any time leveraging the reporting database.

AA GAMA - Evaluator Screencap Examples



Reporting Screen with Sample Configured Reports





Bulk Update Parcels/Accounts

Key Items

- Reports are configured and generated from a reporting database that is refreshed nightly.
- Queries and/or stored procedures can be used to configure and display the reports in AA GAMA - Evaluator
- Reports on all business function including user assignments, arbitrations and litigations are configured.
- Ad-hoc reports.
- Multiple Marshall and Swift Report are configured.
- Bulk update on accounts are run from a scheduled job script.

Summary

All reporting and querying requirements can be met with the reporting database and associated queries.

21. Letter and Forms Processing	YES	NO	Cost to Modify
21.1. Does the system have an integrated method of producing mail-merge type letters to property owners, agents, entities, mortgage companies and attorneys?	Yes		
21.2. Does this letter processing system utilize an industry-standard word processor such as Microsoft Word?	Yes		
21.3. Can the mail-merge function be called from within the appraisal application?	Yes		
21.4. Does the letter processing system display all available fields that can be used for mail-merge features?	Yes		
21.5. Does the letter processing system allow the property main image to be included in the mail-merge function?	Yes		
21.6. Does the letter processing system automatically save an image of the document that is printed or mailed to the property owner, agent, entity, mortgage company, or attorney?	Yes		
21.7. Does the letter processing system allow for custom fields to be entered during creation of each letter? (flex-fields)	Yes		
21.8. Does the system have an integrated forms processing system that will automatically identify the document being scanned using a barcode and assign it to the bar-coded account?		No	
21.9. Does this forms processing system identify the business personal property rendition form?	Yes		
21.9.1. If so, does the process allow the rendition data to be entered when scanned?	Yes		
21.9.2. Is there an option to capture the rendition image and complete data entry later?	Yes		
21.10. Does this forms processing system identify the homestead exemption application form?	Yes		
21.11. Does this forms processing system identify the Notice of Protest form?	Yes		
21.12. Does the forms processing system identify images as Protest Evidence or Letters?	Yes		
21.13. Does the system assign template IDs to all forms and letters?	Yes		
21.14. Does the system assign and track for versioning of letter and form templates?	Yes		
21.15. Does the system preserve the formatting of previously used templates?	Yes		
21.16. Can the system track, maintain, and automatically archive letters or forms in accordance with specific state and/or TAD record retention and record disposition rules?	Yes		
21.17. Does the system allow for the creation of PDF fillable forms?	Yes		
21.18. Does the system allow for forms to be digitally signed by the user and/or property owner?	Yes		
21.19. Can the system generate certified mail numbers?	Yes		
21.20. Can the system generate mail tracking numbers for standard mail?	Yes		
21.21. Can the system be configured to automatically generate and mail a specific letter or form based on changes made by a user?	Yes		
21.22. Does the system allow for a one-to-many relationship between the letter and the exemptions?	Yes		
21.23. Does the system allow for a one-to-many relationship between the letter and the affected tax years?	Yes		
21.24. Does the system allow the user to select from a list of canned responses?	Yes		
21.25. Does the system allow the user to override the mailing address of record for one-off mailings?	Yes		
21.26. Can letters or forms be generated in mass without exporting data to an external spreadsheet or text file?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 21

RFP Table Title: Letter and Forms Processing Capabilities and Advantages

Overall Description

AA GAMA - Evaluator, integrated with [REDACTED]), allows users to create and manage forms and letters connected to the AA GAMA - Evaluator database. These templates automatically populate the required information and pre-fill known fields, supporting various file types and mail merge capabilities. Letters can be stored and maintained for future reference, and with integration to postal service APIs, AA GAMA - Evaluator can generate mail tracking numbers and validate addresses. This seamless integration ensures efficient and accurate communication with property owners, agents, and other stakeholders.

AA GAMA - Evaluator Screenshot Examples

mauro.esriservices.ca/ReportServer - /ESRI.CAMA.Reports.test/Letters

[\[To Parent Directory\]](#)

Friday, March 4, 2022 11:14 AM	620372 Ag Approval Letter
Friday, March 4, 2022 11:14 AM	620753 Ag Denial Letter
Friday, March 4, 2022 11:14 AM	624235 Ag Partial Approval Letter

Microsoft SQL Server Reporting Services Version 15.0.1102.932

Example of letters/forms that have been created for other clients that extract the data from AA GAMA – Evaluator and can be made available in a variety of different formats.

Key Items

- **Integrated Letter Processing System:** AA GAMA - Evaluator features an integrated letter processing system that supports mail-merge functionality using industry-standard word processors like Microsoft Word. It allows users to include property images, utilize custom fields, and save images of sent documents. The system also facilitates generating certified and standard mail tracking numbers from USPS API and mass letter generation without exporting data externally to a 3rd party vendor.
- **Advanced Forms Processing:** The forms processing system in AA GAMA - Evaluator can automatically identify and assign documents using barcodes and the use of [REDACTED]. This provides a wide range of offers for form processing.
- **Template Management and Compliance:** AA GAMA - Evaluator assigns and tracks template IDs, preserves formatting of previously used templates, and supports versioning for letter and form templates. The system also ensures compliance with state record retention rules by automatically archiving letters and forms. Additionally, it allows for creating PDF fillable forms, digital signatures, one-to-many relationships between letters and exemptions or tax years, and selecting canned responses.

Summary

- AA GAMA - Evaluator has inherent functionality and integration with the powerful [REDACTED] [REDACTED] to ensure that all forms and processing options exist from the database.

- Pairing that with the integration with [REDACTED] offerings, creates a powerful feature for all letter and form processing needs.
- We are confident in meeting this requirement and offers multiple approaches for the handling of all documentation needs.

22.Mass Maintenance and Quick Entry System	Yes	No	Cost to Modify
22.1. Does the system have a separate entry system for fast data entry of information as processed by data entry operators without the use of the mouse?	Yes		
22.2. Does this data entry system allow for function keys to be assigned to repetitive functions?	Yes		
22.3. Does the system allow for function key assignment to vary per user?		No	█
22.4. Does the system have a separate mass maintenance system for data entry of information in mass using queries or pre-defined parameters such as subdivision code, geo number ranges, etc.?	Yes		█
22.5. Can a change done in mass be rolled back (undone) for the group of properties affected?			
22.6. Does the system have the means to mass update entities?	Yes		
22.7. Can notes be added in mass?			
22.8. Can assessment statuses be added or updated in mass to prevent reporting to the roll or inclusion on a notice data pull?	Yes		
22.9. Can the fields that are available for mass updated be limited by user rights or groups?	Yes		
22.10. Does the system have the means to mass update agent information?	Yes		
22.11. Does the system support industry standard hot keys and shortcuts	Yes		
	Yes		
	Yes		
23.Account Image Module	Yes	No	Cost to Modify
23.1. Does the system have an integrated Imaging system?		No	█
23.2. Does the system support jpg saving common files to accounts?	Yes		
23.3. Does the system support tif saving common files to accounts?	Yes		
23.4. Does the system support pdf saving common files to accounts?	Yes		
23.5. Does the system support msg saving common files to accounts?	Yes		
23.6. Does the system support saving common Microsoft office file types to accounts?	Yes		
23.7. Does the system allow a primary image to be selected for the account?	Yes		
23.8. Does the system allow the primary image to be year specific?	Yes		
23.9. Does the system allow for document annotation including notes, highlights, shapes, arrows, etc.?	Yes		
23.10. Does the system allow for redaction of sensitive or protected information?	Yes		
23.10.1. If so, is the redaction automated?		No	█
23.10.2. If so, are the redactions retained when printing, downloading, or exporting the document?	Yes		
23.11. Does the system allow for a new image to initiate a workflow process for associated accounts?	Yes		
23.12. Does the system have a hierarchy to organize images?	Yes		
23.12.1. Does the hierarchy support organization by tax year?	Yes		
23.12.2. Does the hierarchy support organization by appraisal method?	Yes		
23.12.3. Does the hierarchy support organization by confidentiality?	Yes		
23.13. Does the system have encryption for confidential document types?	Yes		

Description of AA GAMA - Evaluator Functionality

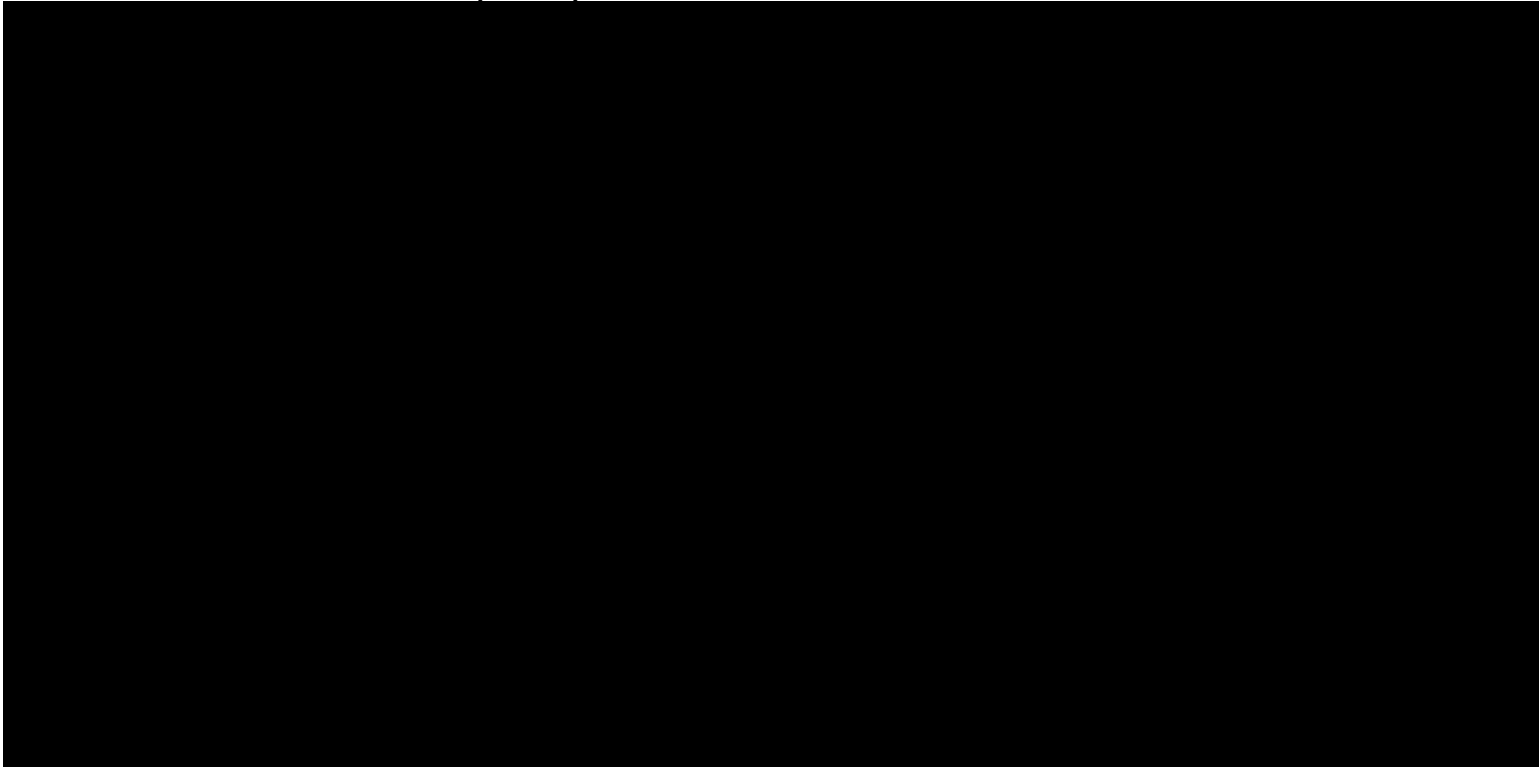
RFP Item: 22

RFP Table Title: Mass Maintenance and Quick Entry System Capabilities and Advantages

Overall Description

- AA GAMA - Evaluator provides an efficient user experience that allows for non-mouse data entry in many high-volume areas of the application. Adding buildings and improvements allows users to quickly tab through the data entry modals with ease and provides color coding for required fields.
- The bulk/mass update function allows users to select fields that need to be update in mass using the advanced search functionality. Once the field is selected the to and from values can be entered and the bulk update can be executed.

AA GAMA - Evaluator Screenshot Examples



Key Items

- Tab enabled data entry forms with efficient layout allow user to enter in data quickly and efficiently with clear understanding of required fields
- Bulk update feature allows users to update data in mass. All data attribute fields can be configured for mass updates.

Summary

Data entry in AA GAMA - Evaluator is fast and efficient. Bulk update feature allows or changes in mass to increase efficiency even further.

Description of AA GAMA - Evaluator Functionality

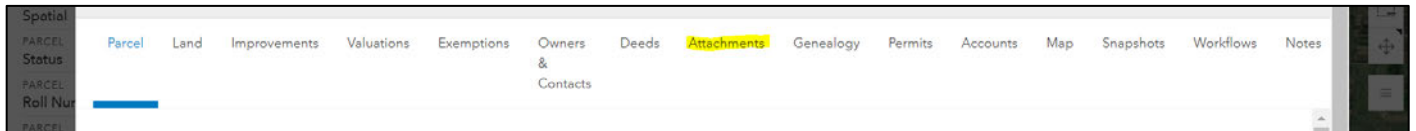
RFP Item: 23

RFP Table Title: Account Image Module Capabilities and Advantages

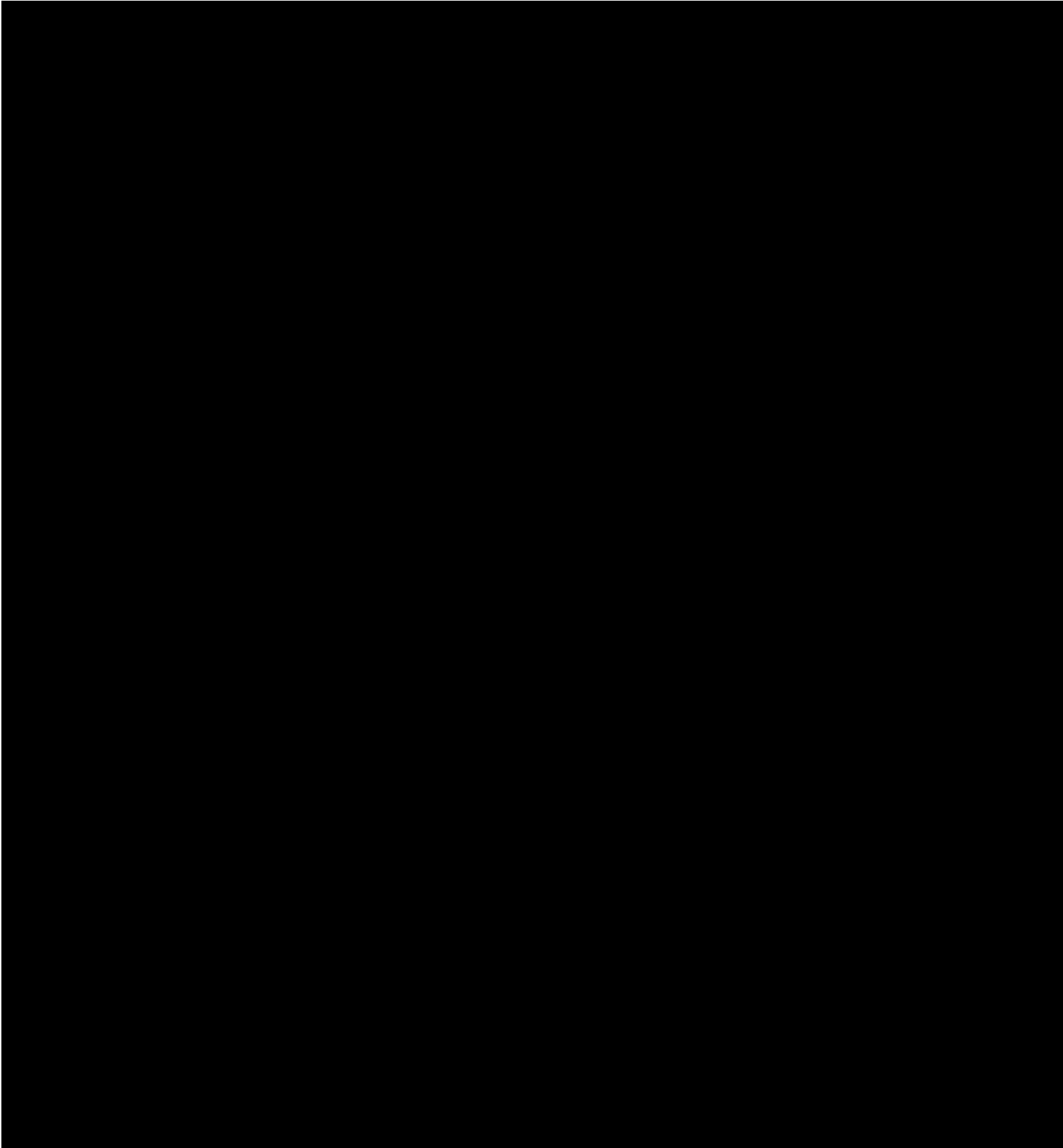
Overall Description

AA GAMA - Evaluator is structured to leverage our customers' [REDACTED] for storage of associated files, photos, attachments in all formats, including video. The user accesses the attachments directly from the user screen for the property they are on. The tab called "Attachments" opens the direct [REDACTED] for all attachments saved to that property. Folder structures can be configured to be in any format such as City->Neigh->Roll Number or County ->Roll Number and further folder structures within a Property can be set to valuation type, appeal etc. based on the needs of the customer.

AA GAMA - Evaluator Examples



Redaction is enabled through an on/off configuration and the source, type or reason for the redaction can be noted for specific type/reason groups



Key Items

- All file attachment types can be leveraged via a [REDACTED] license that our clients provide.
- [REDACTED]
- Redaction is enabled through configuration of redaction types, sources and reasons within the application, or [REDACTED] external to the application.

Summary

- Attachments (all types) are saved to a named folder via [REDACTED] integration, tied to a specific property or account.
- Workflow can be used in addition to add subsequent attachment during all events tied to workflow.
- Redaction can be configured to system, reports and/or data exports during configuration stage of implementation.

VIII. MASS APPRAISAL CAPABILITIES

24.Real Property Valuation	Yes	No	Cost to Modify
24.1. Does the application maintain totally separate appraisal information including related schedules and valuation data by tax year?	Yes		
24.2. Are user-defined schedules used to value?	Yes		
24.2.1. If so, are all schedules completely user-maintainable?	Yes		
24.2.2. Are the schedules maintained by year?	Yes		
24.3. Are improvement features user-definable? (i.e. interior, exterior, fireplace, etc.)	Yes		
24.3.1. If so, is the number of user-definable features unlimited?	Yes		
24.4. Are the user-definable features used to effect value?	Yes		
24.5. Does the application allow valuation using GIM's and EGIM's?	Yes		
24.6. Does the application allow for a loaded cap rate?	Yes		
24.7. Does the application allow allocation of value to different models for mixed use properties?	Yes		
24.8. Does the application apply income or sales models in mass by property type or classification?	Yes		
24.9. Does the application perform regression analysis?	Yes		
24.10. Does the system allow for overrides of modeled values?	Yes		
24.11. Does the system value land by models and tables?	Yes		
24.12. Can the land value method be copied to all accounts in an economic unit?	Yes		
24.13. Can portions of land be coded and valued as excess or surplus land?	Yes		
24.14. Does the system have a reappraisal work flow with statistics by property type and staff member?	Yes		
24.15. Can the system generate ratio studies and reports at any time?	Yes		
24.16. Does the application allow the following units of measurements to be used to value:	Yes		
24.16.1. Square footage?	Yes		
24.16.2. Acreage?	Yes		
24.16.3. Front footage?	Yes		
24.16.4. Lot depth?	Yes		
24.16.5. Length / width?	Yes		
24.16.6. Wall Height?	Yes		
24.16.7. Area Perimeter?	Yes		
24.16.8. Percentage of main area value?	Yes		
24.16.9. Percentage of main area dollars per square foot?	Yes		
24.16.10. User-Definable Features?	Yes		
24.16.11. Flat Value Pricing?	Yes		
24.16.12. Percentage of entity?	Yes		
24.16.13. Percent Finish-out?	Yes		
24.16.14. Per leasable unit?	Yes		
24.17. Does the sketch tool allow drawing by angle and distance?	Yes		
24.18. Does the sketch tool flip and rotate sketches?	Yes		
24.19. Can the sketch tool import and scale building plans so they can be drawn over the top of?	Yes		
24.20. Does the sketch tool allow for overlay on GIS and aerial imagery?	Yes		
24.21. Does the sketch tool allow for a segment of a polygon to be and arc or curve?	Yes		
24.22. Does the application allow for an unlimited number of land and improvement adjustments?	Yes		
24.22.1.1. If so, are the adjustments code-driven?	Yes		
24.22.2. Can the adjustments be identified as percentage or value adjustments?	Yes		

24.22.3. Can a description be saved describing each adjustment?	Yes		
24.23. Does the application allow mass value modifications by all of the following means:	Yes		
24.23.1. Neighborhood?	Yes		
24.23.2. Property type?	Yes		
24.23.3. Subdivision?	Yes		
24.23.4. Cost Multiplier?	Yes		
24.23.5. Local Multiplier?	Yes		
24.23.6. If so, will changing the value of any of the above mass modifiers flag the associated properties automatically for mass recalculation without user intervention?	Yes		
24.24. Does the system support properties where portions are homestead, non homestead, and agricultural special appraisal on a single account?	Yes		
24.25. Does the system allow specific items to be exempt at the detail/feature level, such as solar panels on homes? (This should not be a subtraction of their value at the end but a removal from the taxable value to prevent distortion of HS caps)	Yes		
24.26. Does the system support the Income Approach to valuation?	Yes		
24.26.1. If so, can a user capture and query actual data in the system?	Yes		
24.26.2. Can the user build and track a settlement offer using all valuation methods including DCF, Schedule, Pro Forma and actual rent data?	Yes		
24.26.3. Can the user store a Base Cap rate and account for taxes with the rate using multiple options?	Yes		
24.26.4. Can the user save multiple income models and select the most fitting model for the current years valuation?	Yes		
24.27. Does the system support Marshall & Swift for commercial properties?	Yes		
24.28. Does the system support a process to review remodeled properties and adjust condition characteristics for valuation?	Yes		
25. Personal Property Valuation	Yes	No	Cost to Modify
25.1. Does the system allow BPP accounts to be linked to the real property account?	Yes		
25.2. Can the real property account be found from the BPP account?	Yes		
25.3. Does the real property account display a list of BPP accounts at that location?	Yes		
25.4. Does the system allow for multiple personal property segments (i.e. inventory, furniture & fixtures, etc.) on a personal property account?	Yes		
25.5. Does the system allow for unlimited valuation methods using state-defined schedules?	Yes		
25.6. Does the system allow for user-defined local schedules?	Yes		
25.7. Does the system allow for unlimited years of rendered information?	Yes		
25.8. Does the system allow for the value to be assigned based on a selection of multiple values?	Yes		
25.8.1. For instance: unlimited state-defined or user-defined schedules, prior year value, rendered value, etc.?	Yes		
25.9. Does the system allow the user to define codes?	Yes		
25.10. Does the system allow for the application of depreciation schedules?	Yes		
25.11. Does the system allow for the application of cost index schedules?	Yes		
25.12. Does the system allow the user to define quality and density on a personal property segment?	Yes		
25.13. Does the system allow the user to define the value of a segment that is considered special inventory?	Yes		
25.14. Does the system allow tracking monthly sales dollars of special inventory property?	Yes		
25.15. Does the system allow tracking monthly sales volume of special inventory property?	Yes		

25.16. Does the system allow tracking detail vehicle information of special inventory property?	Yes		
25.17. Does the system report dealers who have not filed their information by user-specified date?	Yes		
25.18. Will the system be able create mass reports from the entry levels above by entity, field area or business type?	Yes		
25.19. Does the system allow for BPP parcels to be updated and/or created remotely with a cellular connection directly into CAMA system?	Yes		
25.20. Does the system allow for new BPP parcels to be created remotely without a cellular connection via external application (excel template)?	Yes		
25.21. Does the system allow quick access to BPP images and documents by tax year at the account level?	Yes		
25.22. Does the system allow the ability to read and populate rendered data from PDF (TAD rendition or state form) to the CAMA system?	Yes		
25.23. Does the system allow for BPP account to be saved in whole (without saving after each entry) before going to another page or session in the CAMA system?	Yes		
25.24. Does the system have the ability for more than one person to access an account simultaneously?	Yes		
25.25. Does the system have prompt response time between screens and updating of data fields?	Yes		
25.26. Will the system be able to recognize entity codes by the situs address automatically and catch errors on entity codes not matching situs?	Yes		
25.27. Does the system allow for staff to create BPP account using customized format to resemble aircraft tail number, mineral lease number, Var-X DBA name or dealer license?	Yes		
25.28. Does the system allow appraisal calculation according to tax code section 21.03, 21.05 and section 21.09 (interstate allocation)?	Yes		
25.29. Does the system allow appraisal calculation according to tax code section 11.251 (freeport exemption)?	Yes		
25.30. Does the system allow appraisal calculation according to tax code section 11.31 (pollution control exemption)?	Yes		
25.31. Does the system allow for the addition of late penalties according to tax code section 11 and section 21 (late filings)?	Yes		
25.32. Does the system allow the acknowledgment of September 1 appraisal designation?	Yes		
25.33. Does the system allow appraisal calculation according to tax code section 11.36 (medical/biomedical exemption)?	Yes		
25.34. Does the system allow appraisal value exception according to tax code section 11.145 (value less than \$2,500)?	Yes		
25.35. Does the system allow appraisal calculation according to tax code section 11.252 (personal use leased vehicle exemption)?	Yes		
25.36. Does the system allow appraisal calculation according to tax code section 11.254 (mixed-use vehicle exemption)?	Yes		
25.37. Does the system allow appraisal calculation via cost and application of depreciation schedules per asset on various location assets?	Yes		
25.38. Does the system report dealers who had fewer than five units sold in a given year?	Yes		
25.39. Does the system provide an asset management system for easy update of assets?	Yes		
25.40. Does the system support the concept of "sub-segments" where multiple assets of the same type can be grouped together and value is rolled up to the segment level?	Yes		
25.41. Does the system allow for a rolled up value to be overridden by the user?	Yes		
25.42. Does the system allow for renditions to be submitted on line?	Yes		
25.43. Does the online rendition allow for pre populating with the prior years assets?	Yes		

Description of AA GAMA - Evaluator Functionality

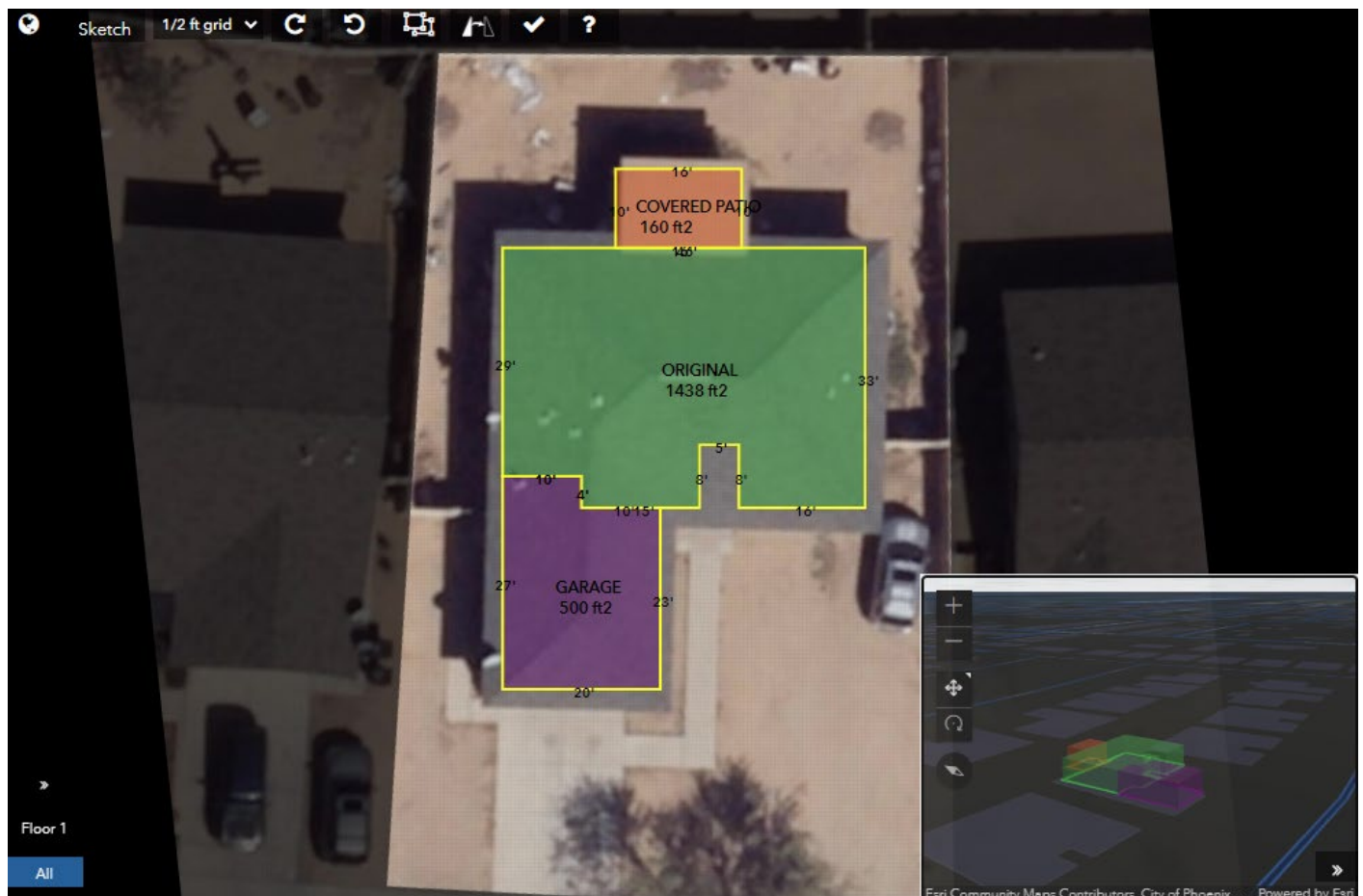
RFP Item: 24

RFP Table Title: Real Property Valuation Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers comprehensive valuation methods, including cost (localized cost tables or online costing engine), market-adjusted cost, income, regression, or a combination of approaches for both land and improvements, defined at the parcel class or property use code level for consistency and uniformity. Users with appropriate privileges can edit these fields, ensuring accuracy and relevancy in assessments. The integrated GeoSketch sketching solution allows properties to be sketched within a GIS environment, with sketches saved as [REDACTED] and easily shared with other stakeholders.

AA GAMA - Evaluator Screenshot Examples



GeoSketch

Key Items

- **Comprehensive Data Management:** AA GAMA - Evaluator maintains separate appraisal information, including related schedules and valuation data by tax year. It supports user-defined schedules, improvement features, valuation models, and overrides, ensuring flexibility and precision in property appraisal.

- **Advanced Valuation and Reporting:** The system allows for various units of measurement, by neighborhood, property type, subdivision, and more. It also allows for an unlimited number of land and improvement adjustments, supporting both percentage and value adjustments with detailed descriptions.
- **Enhanced Sketch and Reporting:** AA GAMA - Evaluator offers a powerful sketch tool called GeoSketch, that supports drawing by angle and distance, importing and scaling building plans through [REDACTED] and overlaying on GIS and aerial imagery. It can also be leveraged to generate reports that are set at a user's preferred market segment.

Summary

- AA GAMA - Evaluator is a complete valuation application that includes all expected valuation methods, adjustments, and reports inherent within the system, to assist with comprehensive and accurate property assessments.
- The market leading GeoSketch leverages the power of GIS to sketch buildings in a GIS environment, allowing users to sketch over aerial images of properties and easily share the sketches with other stakeholders, enhancing collaboration and accuracy.
- We are confident that we can meet all requirements for this feature, as our solution combines advanced valuation capabilities and cutting-edge GIS integration, providing a thorough and reliable tool for property valuation and management.

Description of AA GAMA - Evaluator Functionality

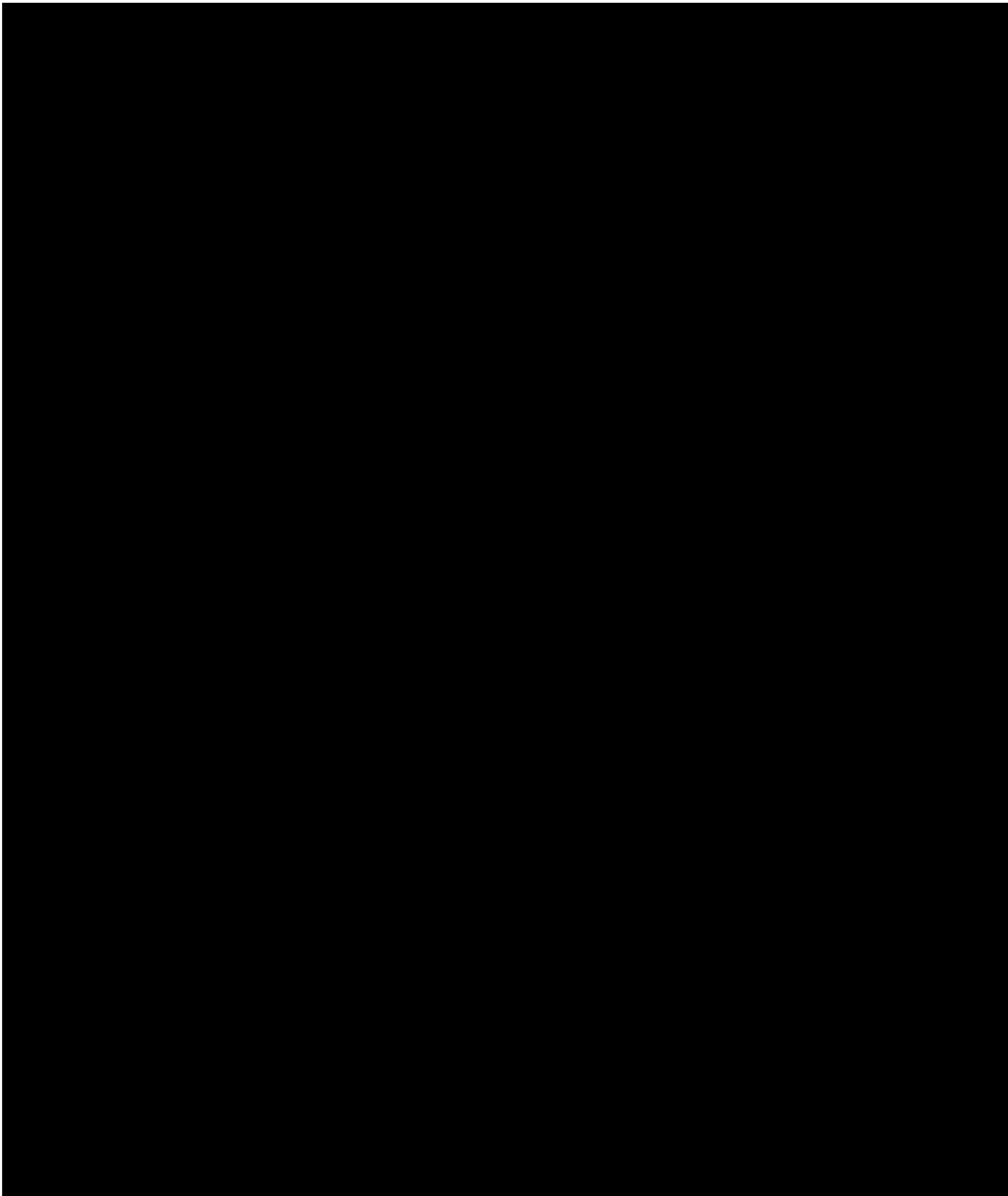
RFP Item: 25

RFP Table Title: Personal Property Valuation Capabilities and Advantages

Overall Description

AA GAMA - Evaluator provides comprehensive functionality related to Personal Property Valuation. The application is equipped to handle all types of personal property and supports all standard approaches to value, reported cost and all forms of depreciation. Using data attributes and characteristics the application is configured to maintain any data field(s) required.

AA GAMA - Evaluator Screenshot Examples



Key Items

- Values can be indexed as per legislation all local depreciation schedules can be accommodated.
- All personal property accounts can be associated (linked) to a real property account.
- All appraisal calculation needed for any legislated exemptions can be accommodated.

Summary

AA GAMA – Evaluator can meet all requirements for personal property accounts.

26.Sales Analysis	Yes	No	Cost to Modify
26.1. Does the application provide for the retention of sales history?	Yes		
26.1.1. Does the application provide for the retention of 30 sales records per property?	Yes		
26.2. Are these instruments displayed in chronological order?	Yes		
26.3. Does the application provide for a way to add sales that are outside of the county?	Yes		
26.4. Does the system allow instruments recorded without affecting the official chain of title?	Yes		
26.5. Does the system allow for confidentiality of the sale separate from the property owner?	Yes		
26.6. Does the application allow for multiple sales to be recorded on one account?	Yes		
26.7. Does the application allow for multiple properties within one sale record?	Yes		
26.7.1. If so, does it combine the market values of properties before comparing to sale price?	Yes		
26.8. Does the application allow for land-only and improvement-only indicators on sale records?	Yes		
26.8.1. If so, does it only use the value indicated when comparing to sale price?	Yes		
26.9. Does system allow the land size indicated in the sale be maintained separately from the recorded land size?	Yes		
26.10. Does the system allow land sales to be tracked and used as comps even after splits and new construction has occurred on the original property?	Yes		
26.11. Does the system allow multiple separate deed transactions to be used to generate a sale entry for a multi property/multi owner transaction? (such as an estate sale)	Yes		
26.12. Does the system link and track mineral interests with real property sales?	Yes		
26.13. Does the system have a module for BPP sales tracking?	Yes		
26.14. Does the system link and track BPP that is part of a sale?	Yes		
26.15. Is sales financing information stored with sale records?	Yes		
26.16. Can the system record multiple confirmations?	Yes		
26.17. Can the sale be flagged as confidential?	Yes		
26.18. Can comparable sales be extracted using user-definable criteria?	Yes		
26.19. Can comparable sales analysis use characteristics as of the time of sale versus current property characteristics?	Yes		
26.20. Are histograms and scatter diagrams available on the sales history?	Yes		
26.21. Are all of the following statistics reported on comparable sales in the application:	Yes		
26.21.1. Mean?	Yes		
26.21.2. Median?	Yes		
26.21.3. Variance?	Yes		
26.21.4. Standard Deviation	Yes		
26.21.5. Coefficient of Dispersion?	Yes		
26.21.6. Sales ratio of the property?	Yes		

Description of AA GAMA - Evaluator Functionality

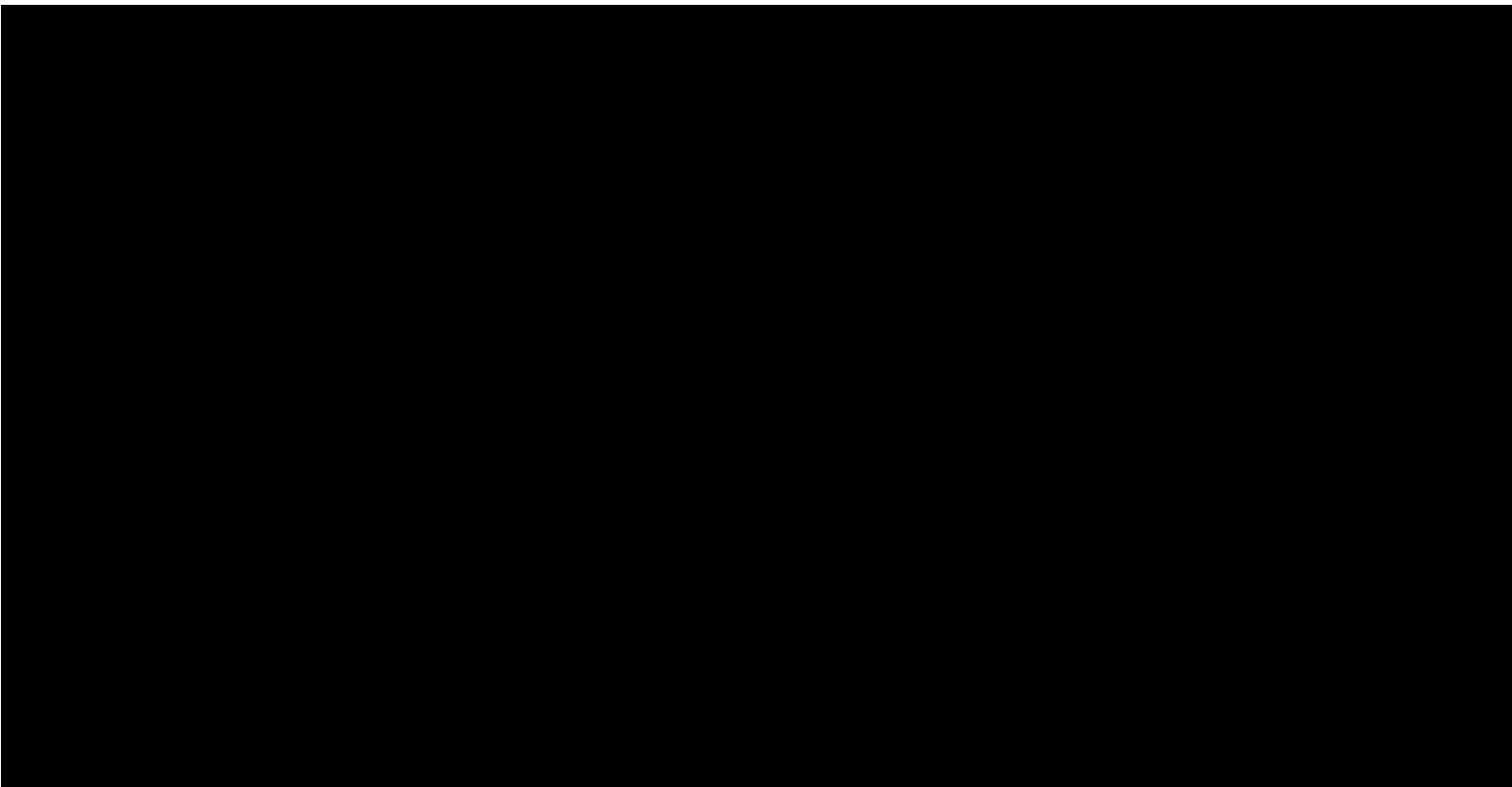
RFP Item: 26

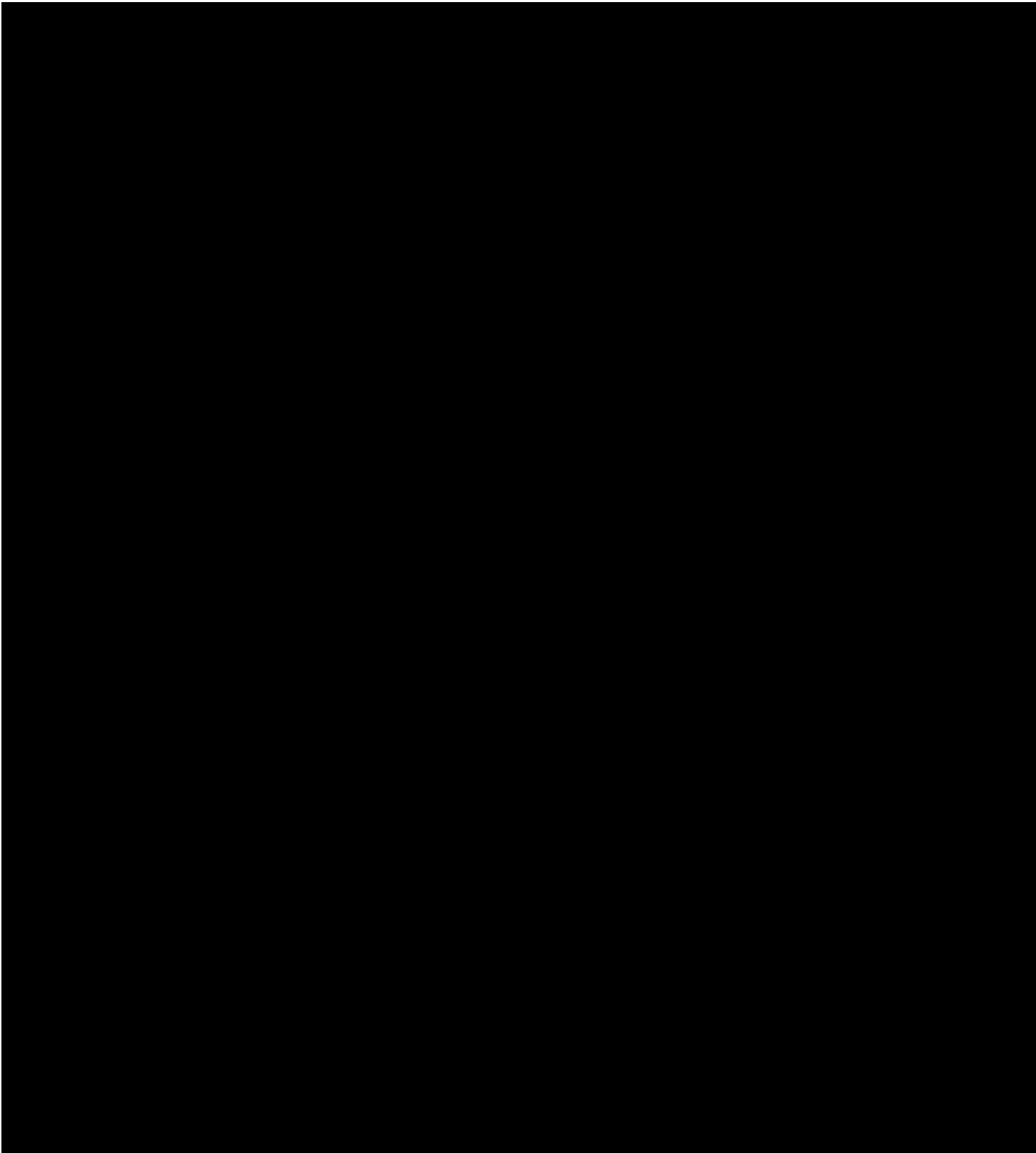
RFP Table Title: Sales Analysis Capabilities and Advantages

Overall Description

AA GAMA – Evaluator has a comprehensive sales tracking and analysis capabilities. The application retains all sales history on accounts and one or more accounts may be associated with a sale as required. When sales are imported or entered into the application a copy (or ‘snapshot’) of the account recorded at the time of sale is taken and retained. The sales ‘snapshot’ can be analyzed and updated as necessary but remains separate from the actual account record. All sales are available for use with the comparable sales tool.

AA GAMA - Evaluator Screenshot Examples





Sales Snapshot

Key Items

- All sales history retained and available for comparable sales.
- Ability to track BPP sale amounts.

- Comparable sales data extracted using user defined criteria and uses characteristics at the time of sale.

Summary

All requirements for sales analysis can bet met or exceeded.

27. Building Permits	Yes	No	Cost to Modify
27.1. Does the system support building permits?	Yes		
27.2. Does the system allow for a building permit to initiate a workflow process for associated accounts?	Yes		
27.3. Does the system allow viewing of building permits by GIS?	Yes		
27.4. Can permits be located by Permit Number?	Yes		
27.5. Can permits be located by Permit Type?	Yes		
27.6. Can permits be located by Appraiser Assigned?	Yes		
27.7. Can permits be located by Property Owner?	Yes		
27.8. Can permits be located by Property ID?	Yes		
27.9. Can permits be located by Situs?	Yes		
27.10. Can a report be printed of building permits?	Yes		
27.11. Can a report be printed for specified building permits?	Yes		
27.12. Can permits be coded active or inactive?	Yes		
27.13. Can permits be coded with multiple properties?	Yes		
27.14. Do permits have a date worked?	Yes		
27.15. Do permits have a date completed?	Yes		
27.16. Do permits have percent complete?	Yes		
27.17. Can permits be imported from other types of files?	Yes		
28. Rollbacks	Yes	No	Cost to Modify
28.1. Does the system provide a quick, easy, user-friendly process for adding AG rollbacks?	Yes		
28.2. Does the system do all calculations automatically for all types of AG rollbacks?	Yes		
28.3. Does the system allow multiple rollbacks on a property at a time?	Yes		
28.4. Does the system allow multiple properties to be processed as a single rollback?	Yes		
28.5. Does the system allow for multiple owners to be part of a rollback group?	Yes		
28.6. Does the system allow for an account to have an absolute exemption in lieu of a rollback?	Yes		
28.7. Does the system allow for automatically generating letters for a rollback?	Yes		
28.8. Does the system import rollback data, letters, and worksheets into ARB when rollbacks are protested?	Yes		
28.9. Does the system provide a calculation worksheet to be given to the taxpayer?	Yes		
29. Comparable Sales & Comparable Property	Yes	No	Cost to Modify
29.1. Does the system allow for comparable sales to be searched for? If so, do the criteria include the following.	Yes		
29.1.1. Can comparable sales be located by a distance radius?	Yes		
29.1.2. Can comparable sales be located by Region Code?	Yes		
29.1.3. Can comparable sales be located by Abstract or Subdivision Code?	Yes		
29.1.4. Can comparable sales be located by Neighborhood Code?	Yes		
29.1.5. Can comparable sales be located by Subset Code?	Yes		
29.1.6. Can comparable sales be located by Map ID?	Yes		
29.1.7. Can comparable sales be located by School Code?	Yes		
29.1.8. Can comparable sales be located by City Code?	Yes		
29.1.9. Can comparable sales be located by situs?	Yes		
29.1.10. Can comparable sales be located by Improvement Class?	Yes		
29.1.11. Can comparable sales be located by Living Area?	Yes		
29.1.12. Can comparable sales be located by Improvement Year Built?	Yes		
29.1.13. Can comparable sales be located by Improvement Unit Price?	Yes		

29.1.14. Can comparable sales be located by Improvement Additive Value?	Yes		
29.1.15. Can comparable sales be located by Land Type?	Yes		
29.1.16. Can comparable sales be located by Land Area?	Yes		
29.1.17. Can comparable sales be located by Land Area Type?	Yes		
29.1.18. Can comparable sales be located by Land Unit Price?	Yes		
29.1.19. Can comparable sales be located by Sale Type?	Yes		
29.1.20. Can comparable sales be located by Sale Date?	Yes		
29.1.21. Can comparable sales be located by Sale Price?	Yes		
29.1.22. Can comparable sales be located by grantor and grantee?	Yes		
29.1.23. Can comparable sales be located by transaction type?	Yes		
29.1.24. Can comparable sales be located by any combination of the above?	Yes		
29.2. Can comparable sales be 'weighted' by each factor above?		No	■
29.3. Can a comparable sales grid be printed include picture images of the comps?	Yes		
29.4. Can a report listing be printed of the selected comps?	Yes		
29.5. Can appraisal cards be printed of the selected comps?	Yes		
29.6. Can comparable PROPERTY be located by same criteria above even if the property has not sold? In other words, can you find LIKE PROPERTY when searching?	Yes		
29.7. Can comparable sales and comparable property be located by Tax Appraisal year?	Yes		
29.8. Can comparable criteria be saved for later retrieval by other users?	Yes		
29.9. Does the system allow for residential comparable sales and equity grids?	Yes		
29.10. Does the system allow for commercial comparable sales and equity grids?	Yes		
29.11. Does the system allow for Income comparable grids?	Yes		
30. Residential Comparable Sales Grid with Automatic Adjustments	Yes	No	Cost to Modify
30.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?		No	■
30.2. Does the system allow comparison of property characteristics at the time of sale versus current property characteristics?	Yes		
30.3. Does the system automatically adjust each individual comp sale component in relation to the subject property?		No	■
30.4. Does the system adjust for Land Market Difference between the subject and comp?		No	■
30.5. Does the system adjust for Effective Year Built differences between the subject and comp?		No	■
30.6. Does the system adjust for Living Area Difference between the subject and comp?		No	■
30.7. Does the system adjust for each improvement detail segment difference?		No	■
30.8. Does the system adjust for Plumbing differences between subject and comp?		No	■
30.9. Does the system adjust for Fireplace differences between subject and comp?		No	■
30.10. Does the system adjust for Number of Bedrooms between subject and comp?		No	■
30.11. Does the system show the Indicated Value for the subject based on the comps listed?		No	■
30.12. Does the system show the Mean & Median for the subject indicated value?	Yes		
30.13. Does the system show the Digital Picture associated with subject and each comp?	Yes		
30.14. Does the system allow for this comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings) ?	Yes		
30.15. Does the system automatically allow for the viewing of such comp grid geographically using GIS coverages?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 27

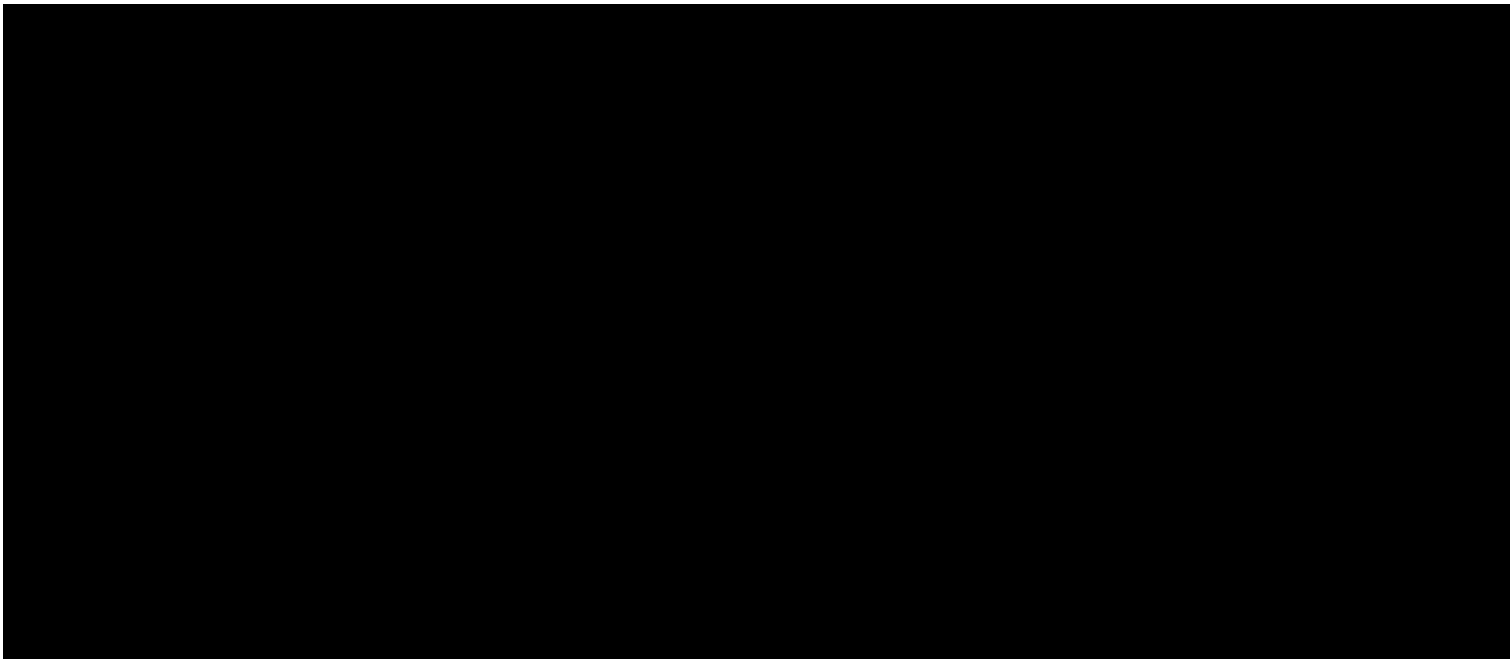
RFP Table Title: Building Permits Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive building permit and workflow solution. Our configurable workflow process ensures that each step aligns with your business practices for adding permits, guaranteeing consistency and compliance. All permits can be imported and are searchable through our advanced search feature and can be displayed in a GIS environment for enhanced visualization and management.

AA GAMA - Evaluator Screenshot Example

Permit



- **Comprehensive Permit Management:** AA GAMA - Evaluator supports building permit management, including initiating workflow processes for associated parcels and for viewing permits through GIS, permit number, type, appraiser assigned, property owner, property ID, and situs.
- **Detailed Reporting Capabilities:** The application allows for detailed reporting, enabling the printing of building permits and generating reports for specified permits, with capabilities to mark permits as active or inactive and code them with multiple properties.
- **Progress Tracking and Flexibility:** AA GAMA - Evaluator tracks permit progress with fields for date worked, date completed, and percent completed through our configurable workflow, and supports the importing permits.

Summary

- AA GAMA - Evaluator provides a complete configurable permitting workflow process that aligns with current or desired business practices while maintaining consistency for data inputs.

- All building permits can be imported, searched, and tracked for status to monitor progress, with the ability to print reports as needed.
- We are confident that AA GAMA - Evaluator will meet these requirements by offering a complete and flexible system that adapts to your workflow needs, ensuring comprehensive permit management and reporting capabilities.

Description of AA GAMA - Evaluator Functionality

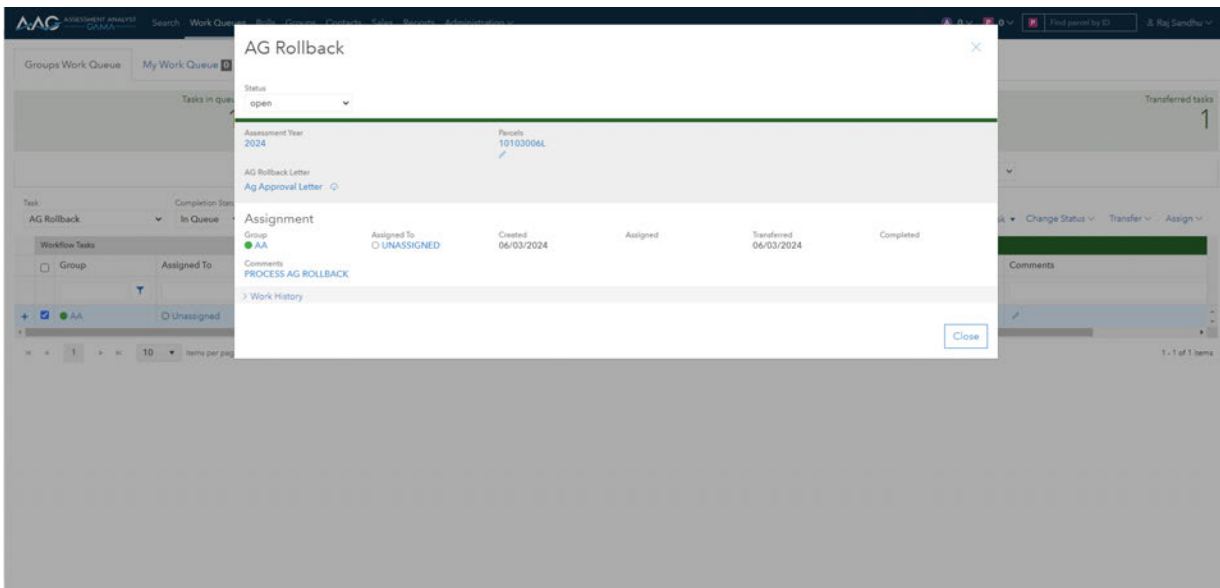
RFP Item: 28

RFP Table Title: Rollbacks Capabilities and Advantages

Overall Description

AA GAMA – Evaluator provides flexibility for the user to process rollbacks. Users can leverage configurable workflow engine to follow a consistent series of steps to process a rollback. The configurable workflow allows the user to generate any letters needed for property account owners and does calculations automatically.

AA GAMA - Evaluator Screenshot Example



AG Rollback Workflow

Key Items

- Configurable workflow allows users to follow consistent and uniform steps.
- Application processes calculation automatically.
- Allows absolute exemption in lieu of rollback if necessary.
- Generates letters based on workflow status.

Summary

- Configurable workflow engine is configured to handle all requirements of rollbacks.
- User can amend workflow steps if required in the future.

Description of AA GAMA - Evaluator Functionality

RFP Item: 29

RFP Table Title: Comparable Sales and Comparable Property Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive comparable sales selection tool that seamlessly integrates CAMA data with spatial searching capabilities. This ensures that users can search for and identify comparable sales based on the unique attributes and characteristics of a Subject property. The tool features a configurable grid format, allowing users to display relevant data attributes or characteristics specific to the Subject property while omitting those that are not applicable. Additionally, the intuitive 'drag and drop' functionality enables users to rearrange the comparable sales in any order that best supports the assessment of the Subject property's value. All this information can also be visually represented on a GIS map, providing a powerful and user-friendly interface for property assessment.

AA GAMA - Evaluator Screenshot Example

The screenshot displays a GIS map at the top with three numbered markers (1, 2, 3) indicating property locations. Below the map is a table with three columns corresponding to these markers. The table includes fields for Folio ID, Address, Image, Sale Date, Sale Price, Value, Neighborhood, Land Use, Area, Building Class, Total Building Area, Effective Year, Garage Count, and Garage Area.

	1	2	3
Folio ID	31004480 2024	31004495 2024	31004486 2024
Address	1146 W LAREDO AVE GILBERT AZ 85233	1081 W BOSAL DR GILBERT AZ 85233	1177 W BOSAL DR GILBERT AZ 85233
Image			
Sale Date	05/01/2002	08/01/2022	02/01/2023
Sale Price		\$775,000	\$728,000
Value	\$579,100	\$604,200	\$606,300
Neighborhood	01	01	01
Land Use	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)
Area	7200	7187	7200
Building Class	4 - CLASS R4	4 - CLASS R4	4 - CLASS R4
Total Building Area	3089	3089	3089
Effective Year	2002	2001	2001
Garage Count	1	1	1
Garage Area	590	590	590

Key Items

- Extensive Search Criteria: AA GAMA - Evaluator allows users to locate comparable sales using a wide range of criteria, including all the items that are listed as use cases. Additionally, the system can search for comparable properties that have not sold, using the same criteria.
- Customization and Reporting: The system supports the printing of comparable sales grids, including images, as well as appraisal cards and report listings for selected comparable properties. The user can save the search criteria for future use and print of the selected comps.
- Versatile Property Comparisons: AA GAMA - Evaluator supports residential, commercial, and income comparable sales and equity grids, and allows users to search for comparable properties by tax appraisal year.
- Roadmap Item: The ability to 'weight' the different search criteria or factors is something that is included in our [REDACTED]. A core piece of functionality that is needed within the appraisal industry and once this has been added and fully tested, it will be made available to all our clients as a core piece of functionality. There will be zero cost to provide this feature to meet the requirements.

Summary

- The ability to search, select, and display comparable sales within our application is inherent within our application. The ability to leverage the power of our GIS platform for sales visualization will allow for the selection of comparable sales a fast and efficient process.
- We would be able to meet this requirement through a configuration and working in partnership with your project team to configure the appropriate data attributes and characteristics that are needed within your comparable sales grid.
- Once we deliver the [REDACTED] for our comparable sales selection tool, then we will have successfully met all the items listed within in requirement.

Description of AA GAMA - Evaluator Functionality

RFP Item: 30

RFP Table Title: Residential Comparable Sales Grid with Automatic Adjustments Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive comparable sales selection tool that seamlessly integrates CAMA data with spatial searching capabilities. This ensures that users can search for and identify comparable sales based on the unique attributes and characteristics of a Subject property. The tool features a configurable grid format, allowing users to display relevant data attributes or characteristics specific to the Subject property while omitting those that are not applicable. Additionally, the intuitive 'drag and drop' functionality enables users to rearrange the comparable sales in any order that best supports the assessment of the Subject property's value. All this information can also be visually represented on a GIS map, providing a powerful and user-friendly interface for property assessment.

AA GAMA - Evaluator Screenshot Example



+ Add Field v

	1	2	3
Folio ID	P 31004480 2024	P 31004495 2024	P 31004486 2024
Address	1146 W LAREDO AVE GILBERT AZ 85233	1081 W BOSAL DR GILBERT AZ 85233	1177 W BOSAL DR GILBERT AZ 85233
Image			
Sale Date	05/01/2002	08/01/2022	02/01/2023
Sale Price		\$775,000	\$728,000
Value	\$579,100	\$604,200	\$606,300
Neighborhood	01	01	01
Land Use	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)
Area	7200	7187	7200
Building Class	4 - CLASS R4	4 - CLASS R4	4 - CLASS R4
Total Building Area	3089	3089	3089
Effective Year	2002	2001	2001
Garage Count	1	1	1
Garage Area	590	590	590

Key Items

- User-Friendly Features:** Users can view the comparable sales grid geographically using GIS coverages, associate the grid with a property record for later retrieval, and generate detailed reports, making it a versatile and efficient tool for property assessment and valuation.
- Roadmap Item:** AA GAMA - Evaluator will introduce the ability to automatically adjust individual components, data attributes, and characteristics between a comparable sale(s) and the

subject property. This configurable feature will meet all listed requirements, becoming a core functionality essential for the appraisal industry. Once fully tested, it will be available to all clients at no additional cost.

Summary

- AA GAMA - Evaluator allows users to view comparable sales grids geographically with GIS, associate grids with property records, generate detailed reports, and retrieve comparable sales data as needed, making it an efficient tool for property assessment.
- [REDACTED], AA GAMA - Evaluator will include automatic adjustments for individual components and characteristics between sales and subject properties. This feature will be configurable to meet specific business needs, enhancing its core functionality for the appraisal industry.
- Once we deliver the ability to include automatic adjustments between sales and subject properties in [REDACTED], then we will have successfully met all the items listed within in requirement.

31. Residential Equity Comp Grid with Automatic Adjustments	Yes	No	Cost to Modify
31.1. Does the system automatically generate an equitable property grid weighted to the characteristics of the subject?		No	■
31.2. Does the system automatically adjust each individual equity component in relation to the subject property?		No	■
31.3. Does the system adjust for Land Market Difference between the subject and equity comp?		No	■
31.4. Does the system adjust for Effective Year Built Difference between the subject and equity comp?		No	■
31.5. Does the system adjust for Living Area Difference between the subject and equity comp?		No	■
31.6. Does the system adjust for each improvement detail segment difference?		No	■
31.7. Does the system adjust for Plumbing differences between subject and equity comp?		No	■
31.8. Does the system adjust for Fireplace differences between subject and equity comp?		No	■
31.9. Does the system adjust for Number of Bedrooms between subject and equity comp?		No	■
31.10. Does the system show the Indicated Value for the subject based on the equity comps listed?		No	■
31.11. Does the system show the Mean & Median for the subject indicated value?	Yes		
31.12. Does the system show the Digital Picture associated with subject and each equity comp?	Yes		
31.13. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings)?	Yes		
31.14. Does the system automatically allow for the viewing of such equity comp grid geographically using GIS coverages?	Yes		
32. Commercial Comp Sales Grid with Automatic Adjustments	Yes	No	Cost to Modify
32.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?		No	■
32.2. Does the system allow generation of a comp grid for properties valued on income?		No	■
32.3. Does the system allow comparison of property characteristics at the time of sale versus current property characteristics?		No	■
32.4. Does the system automatically adjust each individual comp sale component in relation to the subject property?		No	■
32.5. Does the system adjust for Land Market Difference between the subject and comp?		No	■
32.6. Does the system adjust for Effective Year Built differences between the subject and comp?		No	■
32.7. Does the system adjust for Living Area Difference between the subject and comp?		No	■
32.8. Does the system adjust for each improvement detail segment difference?		No	■
32.9. Does the system adjust for Plumbing differences between subject and comp?		No	■
32.10. Does the system adjust for Fireplace differences between subject and comp?		No	■
32.11. Does the system adjust for Number of Bedrooms between subject and comp?		No	■
32.12. Does the system show the Indicated Value for the subject based on the comps listed?		No	■
32.13. Does the system show the Mean & Median for the subject indicated value?	Yes		
32.14. Does the system show the Digital Picture associated with subject and each comp?	Yes		
32.15. Does the system allow for this comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings) ?	Yes		
32.16. Does the system automatically allow for the viewing of such comp grid geographically using GIS coverages?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 31

RFP Table Title: Residential Equity Comp Grid with Automatic Adjustments Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive equity comparable selection tool that seamlessly integrates CAMA data with spatial searching capabilities. This ensures that users can search for and identify comparable sales based on the unique attributes and characteristics of a Subject property. The tool features a configurable grid format, allowing users to display relevant data attributes or characteristics specific to the Subject property while omitting those that are not applicable. Additionally, the intuitive 'drag and drop' functionality enables users to rearrange the comparable sales in any order that best supports the assessment of the Subject property's value. All this information can also be visually represented on a GIS map, providing a powerful and user-friendly interface for property assessment.

AA GAMA - Evaluator Screenshot Example

The screenshot displays a GIS map at the top with four numbered markers (1, 2, 3, 4) indicating property locations. Below the map is a comparison table with the following data:

	1	2	3	4
Folio ID	31004487 2024	31004483 2024	31004482 2024	31004486 2024
Address	1165 W BOSAL DR GILBERT AZ 85233	1178 W LAREDO AVE GILBERT AZ 85233	1166 W LAREDO AVE GILBERT AZ 85233	1177 W BOSAL DR GILBERT AZ 85233
Image				
Value	\$547,600	\$522,100	\$635,100	\$606,300
Neighborhood	01	01	01	01
Land Use	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)	RD - RESIDENTIAL (ACRES)
Area	7200	7200	7200	7200
Building Class	4 - CLASS R4	4 - CLASS R4	4 - CLASS R4	4 - CLASS R4
Total Building Area	2198	2198	3255	3089
Effective Year	2001	2002	2001	2001
Garage Count	2	2	1	1
Garage Area	684	684	629	590

Key Items

- **User-Friendly Features:** Users can view the equity comparable grid geographically using GIS coverages, associate the grid with a property record for later retrieval, and generate detailed reports, making it a versatile and efficient tool for property assessment and valuation.
- **Roadmap Item:** [REDACTED] AA GAMA - Evaluator will introduce the ability to automatically adjust individual components, data attributes, and characteristics between equity comps and the subject property. This configurable feature will meet all listed requirements, becoming a core functionality essential for the appraisal industry. Once fully tested, it will be available to all clients at no additional cost.

Summary

- AA GAMA - Evaluator allows users to view equity comparable grid geographically with GIS, associate grids with property records, generate detailed reports, and retrieve comparable equity data as needed, making it an efficient tool for property assessment.
- [REDACTED] AA GAMA - Evaluator will include automatic adjustments for individual components and characteristics between the subject and an equity comparable(s). This feature will be configurable to meet specific business needs, enhancing its core functionality for the appraisal industry.
- Once we deliver the ability to include automatic adjustments between an equity comparable and subject properties in [REDACTED] we will have successfully met all the items listed within in requirement.

Description of AA GAMA - Evaluator Functionality

RFP Item: 32

RFP Table Title: Commercial Comp Sales Grid with Automatic Adjustments Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive comparable sales selection tool that seamlessly integrates CAMA data with spatial searching capabilities. This ensures that users can search for and identify comparable sales based on the unique attributes and characteristics of a Subject property. The tool features a configurable grid format, allowing users to display relevant data attributes or characteristics specific to the Subject property while omitting those that are not applicable. Additionally, the intuitive 'drag and drop' functionality enables users to rearrange the comparable sales in any order that best supports the assessment of the Subject property's value. All this information can also be visually represented on a GIS map, providing a powerful and user-friendly interface for property assessment.

AA GAMA - Evaluator Screenshot Example



	1	2	3	4	5
Folio ID	30211031 2024	30211076A 2024	30211050 2024	30211051 2024	30211131 2024
Address	1325 N MONDEL DR GILBERT AZ 85233	1320 N ACACIA DR GILBERT AZ 85233	1350 N MONDEL DR GILBERT AZ 85233	1420 N MONDEL DR GILBERT AZ 85233	1315 N HOBSON ST GILBERT AZ 85233
Image					
Sale Date	12/01/1997	06/01/2023	02/01/2023	01/01/2023	04/01/2023
Sale Price	\$53,864	\$1,000,000	\$1,600,000	\$1,350,000	\$2,775,000
Value	\$990,600	\$695,700	\$1,118,400	\$941,800	\$1,471,400
Land Use	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)
Area	21244	20541	18663	17251	20421
Occupancy	338 - 338	344 - 344	406 - 406	406 - 406	406 - 406
Total Building Area	5158	2842	6967	5414	8136
Effective Year	1998	2000	1999	1999	1998
Quality	2 - 2	2 - 2	2 - 2	3 - 3	3 - 3

Comparable Sales

Key Items

- **User-Friendly Features:** Users can view the comparable sales grid geographically using GIS coverages, associate the grid with a property record for later retrieval, and generate detailed reports, making it a versatile and efficient tool for property assessment and valuation.
- **Roadmap Item:** [REDACTED], AA GAMA - Evaluator will introduce the ability to automatically adjust individual components, data attributes, and characteristics between a comparable sale(s) and the subject property. This configurable feature will meet all listed requirements, becoming a core functionality essential for the appraisal industry. Once fully tested, it will be available to all clients at no additional cost.

Summary

- AA GAMA - Evaluator allows users to view comparable sales grids geographically with GIS, associate grids with property records, generate detailed reports, and retrieve comparable sales data as needed, making it an efficient tool for property assessment.
- [REDACTED], AA GAMA - Evaluator will include automatic adjustments for individual components and characteristics between sales and subject properties. This feature will be configurable to meet specific business needs, enhancing its core functionality for the appraisal industry.
- Once we deliver the ability to include automatic adjustments between sales and subject properties in [REDACTED], then we will have successfully met all the items listed within in requirement.

33.Commercial Equity Comp Grid with Automatic Adjustments	Yes	No	Cost to Modify
33.1. Does the system automatically generate an equitable property grid weighted to the characteristics of the subject?		No	<input checked="" type="checkbox"/>
33.2. Does the system automatically adjust each individual equity component in relation to the subject property?		No	<input checked="" type="checkbox"/>
33.3. Does the system allow generation of a comp grid for properties valued on income?		No	<input checked="" type="checkbox"/>
33.4. Does the system adjust for Land Market Difference between the subject and equity comp?		No	<input checked="" type="checkbox"/>
33.5. Does the system adjust for Effective Year Built Difference between the subject and equity comp?		No	<input checked="" type="checkbox"/>
33.6. Does the system adjust for Living Area Difference between the subject and equity comp?		No	<input checked="" type="checkbox"/>
33.7. Does the system adjust for each improvement detail segment difference?		No	<input checked="" type="checkbox"/>
33.8. Does the system adjust for Plumbing differences between subject and equity comp?		No	<input checked="" type="checkbox"/>
33.9. Does the system adjust for Fireplace differences between subject and equity comp?		No	<input checked="" type="checkbox"/>
33.10. Does the system adjust for Number of Bedrooms between subject and equity comp?		No	<input checked="" type="checkbox"/>
33.11. Does the system show the Indicated Value for the subject based on the equity comps listed?		No	<input checked="" type="checkbox"/>
33.12. Does the system show the Mean & Median for the subject indicated value?	Yes		
33.13. Does the system show the Digital Picture associated with subject and each equity comp?	Yes		
33.14. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings)?	Yes		
33.15. Does the system automatically allow for the viewing of such equity comp grid geographically using GIS coverages?	Yes		
34.Profiling			
34.1. Does the system allow for profiling of Appraisal and sales information based on appraisal vs sale ratios?	Yes		
34.2. Does the system allow profiling with characteristics at the time of sale versus current property characteristics?	Yes		
34.3. By Neighborhood?	Yes		
34.4. By Abstract/Subdivision Code?	Yes		
34.5. By Region?	Yes		
34.6. By Subset?	Yes		
34.7. By Query?	Yes		
34.8. Does the profile report provide the following statistical functions:			
34.8.1. Lows and highs?	Yes		
34.8.2. Mean?	Yes		
34.8.3. Median?	Yes		
34.8.4. Averages?	Yes		
34.8.5. Coefficient of Dispersion?	Yes		
34.8.6. Coefficient of Variance?	Yes		
34.8.7. Gross Rent Multipliers?	Yes		
34.8.8. Gross Income Multipliers?	Yes		
34.8.9. Class Breakdown?	Yes		
34.8.10. Plot sales ratios on a graph?	Yes		
34.9. Does the system provide Neighborhood Calibration?	Yes		
34.10. Provide statistics by overall, improved, and vacant?	Yes		

34.11. Does the profiling process for one neighborhood take less than 1 minute to complete?	Yes		
34.12. Does the application allow you to 'link' profiles?	Yes		
35. GIS Connectivity	Yes	No	Cost to Modify
35.1. Does the system support an integrated live connection to a GIS System?	Yes		
35.2. Does the system support an integrated live connection to ESRI online?	Yes		
35.3. Does the system allow for GIS to be viewed from within application?	Yes		
35.4. Can year specific data be displayed in the GIS front-end?	Yes		
35.4.1. Does year specific data pull from the system?	Yes		
35.5. Does the system allow a default map template to be created for users? (All users view the map configuration upon accessing GIS.)	Yes		
35.5.1. Can a user save a specific map configuration for his responsibilities, where the default map view for the system is not obstructed? (The user can create and modify the data and layers in the map view accessed from his login.)	Yes		
35.5.2. Is map configuration limited by user rights?	Yes		
35.6. Does user have control over GIS files to be viewed?	Yes		
35.7. Can user have panoramic capabilities in GIS?	Yes		
35.8. Does the GIS tool utilize shortcut keys for zoom?	Yes		
35.9. Does the GIS tool utilize shortcut keys for pan?	Yes		
35.10. Does the GIS tool utilize shortcut keys for select/unselect?	Yes		
35.11. Does the GIS front-end allow multiple tools for zooming within the map?	Yes		
35.11.1. Zoom tool?	Yes		
35.11.2. Mouse scroll?	Yes		
35.11.3. Mouse click?	Yes		
35.12. Can a user print map?	Yes		
35.12.1. If so, can user configure map format and add text for print output?	Yes		
35.13. Can GIS display attribute data on map?	Yes		
35.14. Is attribute data viewed controlled by user rights?	Yes		
35.15. Can user control the display of labels for attribute within the GIS front-end?	Yes		
35.16. Can user access different properties from GIS?	Yes		
35.17. Can user search for properties within GIS? If so by:	Yes		
35.17.1. Property ID?	Yes		
35.17.2. State Code	Yes		
35.17.3. Subdivision	Yes		
35.17.4. Neighborhood	Yes		
35.17.5. Entities	Yes		
35.17.6. Situs Address	Yes		
35.17.7. Owner	Yes		
35.17.8. Land size	Yes		
35.17.9. Improvement class	Yes		
35.17.10. Improvement year built	Yes		
35.17.11. Sale date	Yes		
35.17.12. Price/sq ft	Yes		
35.17.13. Sale type	Yes		
35.17.14. Building permit number	Yes		
35.17.15. Permit date	Yes		
35.17.16. Permit status	Yes		
35.17.17. Appraiser	Yes		
35.17.18. Inspection date	Yes		
35.17.19. Effective acres grouping	Yes		
35.18. Does GIS locate property and zoom to the property in GIS map view?	Yes		

○ Can application integrate with multiple data sources?	Yes		
▪ Shapefiles?	Yes		
▪ Rasters?	Yes		
▪ Map packages?	Yes		
▪ SDE?	Yes		
▪ Geodatabase	Yes		
▪ ESRI published basemaps?	Yes		
○ Can aerial imagery be viewed from GIS?	Yes		
○ Can a user print a preliminary appraisal roll for properties selected in the GIS?	Yes		
○ Can a user print an appraisal card for properties selected from the GIS front-end?	Yes		
○ Can a user add a text note to a property within the GIS front-end?	Yes		
○ Can user view linked properties and details of each property from the GIS front-end?	Yes		
○ Can user 'bookmark' specific properties to return to within the GIS front-end?	Yes		
○ Does system provide a quick, easy, user-friendly process to add GIS files?	Yes		
○ Does the system allow for mass update of CAMA data using a GIS front-end?	Yes		
○ Can GIS be used in connection with Pictometry?	Yes		
○ Can GIS be used in connection with Google maps?	Yes		
○ Can GIS be used in connection with Bing maps?	Yes		
○ Can GIS be used in connection with Cyclomedia?	Yes		
○ Can user select and de-select properties for processing from GIS front-end?	Yes		
○ Can user apply Symbology to layers within GIS front-end?	Yes		
○ Can user apply spatial analysis in GIS front-end?	Yes		
▪ Buffer	Yes		
▪ Clip	Yes		
▪ Intersect	Yes		
▪ Union	Yes		
▪ If so, can user update properties from GIS front-end selected by spatial analysis tools within GIS front-end?	Yes		
○ Can user select properties by radius or buffer from GIS?	Yes		
○ Can user view linked properties, including BPP, and details of each property from the GIS front-end?	Yes		
36.Portable Field Devices	Yes	No	Cost to Modify
36.1. Does the system allow electronic field devices to be used for fieldwork?	Yes		
36.2. Are the proposed portable field devices Lightweight? Approx Weight: 1.02 lbs	Yes		
36.3. Does the system provide a user-friendly interface for fieldwork?	Yes		
36.4. Is that interface designed specifically for mobile touch devices?	Yes		
36.5. Does the system provide a way to configure, customize and define the user interface on the tablet device for use in the field? This configuration should be available and not require additional programming by the vendor.	Yes		
36.6. Is the field device required to have an open internet connection in order to function?	Yes		
36.7. Will the field device work in both an online and offline mode?	Yes		
36.8. Does the field device automatically provide an optimal route for visiting the parcels?	Yes		
36.9. Can the appraiser view the property information on one screen in an electronic field card view?	Yes		
36.10. Does the field solution allow for data validation during entry by the appraiser? This is to help aid the appraiser's data entry and only allow valid values to be entered into the system.	Yes		

36.37. Can the user delete an account?	Yes		
37. Internet Capabilities	Yes	No	Cost to Modify
37.1. Does the system allow for live publishing of Appraisal Information on the Internet?	Yes		
37.2. Does the system allow support tickets to be entered and monitored on the Internet?	Yes		
37.3. Does the system allow Taxpayers to file a HS Exemption Application online?	Yes		
37.4. Does the system allow an Agent to file non HS applications online?	Yes		
37.5. Does the system allow a Taxpayer to verify their ownership and update their mailing address and other contact information online?	Yes		
37.6. Does the application support automated chat or other AI customer assistance features?	Yes		
37.7. Does the system suppress confidential information from the general public while making it accessible to the authorized owner or agent via their specific online account?	Yes		
37.8. Does the system allow an Agent to file a HS Exemption Application online?	Yes		
37.9. Does the system allow an Agent to file non HS applications online?	Yes		
37.10. Does the system allow an Agent to manage fiduciary responsibilities online, including filing Appointment of Agent and removing FID authority?	Yes		
37.11. Does the system allow an owner to manage their agent online?	Yes		
37.12. Does the system allow filing a BPP rendition online?	Yes		
37.13. Does the system automatically import online application data into the correct fields in the database?	Yes		
37.14. Does the system allow the user to configure custom online applications and import the data into the correct fields in the database?	Yes		
37.15. Does the system allow the user to survey rental rates and vacancy online and populate the results into appropriate fields of a table in the database for analysis?	Yes		
37.16. Does the system allow the user to generate custom surveys and map the results into appropriate fields and tables in the database?	Yes		
37.17. Does the system allow TAD appraisers to access and update data online?	Yes		
37.18. Does the system include an ARB database as required by state law?	Yes		

Description of AA GAMA - Evaluator Functionality

RFP Item: 33

RFP Table Title: Commercial Equity Comp Grid with Automatic Adjustments Capabilities and Advantages

Overall Description

AA GAMA - Evaluator offers a comprehensive equity comparable selection tool that seamlessly integrates CAMA data with spatial searching capabilities. This ensures that users can search for and identify comparable sales based on the unique attributes and characteristics of a Subject property. The tool features a configurable grid format, allowing users to display relevant data attributes or characteristics specific to the Subject property while omitting those that are not applicable. Additionally, the intuitive 'drag and drop' functionality enables users to rearrange the comparable sales in any order that best supports the assessment of the Subject property's value. All this information can also be visually represented on a GIS map, providing a powerful and user-friendly interface for property assessment.

AA GAMA - Evaluator Screenshot Example

The screenshot displays a GIS map at the top with a grid overlay. A vertical column of five numbered circles (1-5) is positioned over the map, corresponding to the columns in the table below. The table lists five comparable properties with their respective details.

	1	2	3	4	5
Folio ID	30211034 2024	30211031 2024	30211035 2024	30211032 2024	30211033 2024
Address	1245 N MONDEL DR GILBERT AZ 85233	1325 N MONDEL DR GILBERT AZ 85233	1235 N MONDEL DR GILBERT AZ 85233	1315 N MONDEL DR GILBERT AZ 85233	1255 N MONDEL DR GILBERT AZ 85233
Image					
Value	\$1,181,200	\$990,600	\$1,378,400	\$933,600	\$1,155,000
Land Use	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)	CM - COMMERCIAL (ACRES)
Area	21892	21244	23528	21310	21215
Occupancy	338 - 338	338 - 338	494 - 494	338 - 338	406 - 406
Total Building Area	6544	5158	8813	4894	6770
Effective Year	2005	1998	2000	1998	2002
Quality	2 - 2	2 - 2	2 - 2	3 - 3	3 - 3

Equity Comparable Selection Tool

Key Items

- **User-Friendly Features:** Users can view the equity comparable grid geographically using GIS coverages, associate the grid with a property record for later retrieval, and generate detailed reports, making it a versatile and efficient tool for property assessment and valuation.

- Roadmap Item: [REDACTED] AA GAMA - Evaluator will introduce the ability to automatically adjust individual components, data attributes, and characteristics between equity comps and the subject property. This configurable feature will meet all listed requirements, becoming a core functionality essential for the appraisal industry. Once fully tested, it will be available to all clients at no additional cost.

Summary

- AA GAMA - Evaluator allows users to view equity comparable grid geographically with GIS, associate grids with property records, generate detailed reports, and retrieve comparable equity data as needed, making it an efficient tool for property assessment.
- [REDACTED], AA GAMA - Evaluator will include automatic adjustments for individual components and characteristics between the subject and an equity comparable(s). This feature will be configurable to meet specific business needs, enhancing its core functionality for the appraisal industry.
- Once we deliver the ability to include automatic adjustments between an equity comparable and subject properties in [REDACTED] then we will have successfully met all the items listed within in requirement.

Description of AA GAMA - Evaluator Functionality

RFP Item: 34

RFP Table Title: Profiling Capabilities and Advantages

Overall Description

AA GAMA - Evaluator features advanced data profiling capabilities, allowing users to comprehensively analyze and understand various data attributes and characteristics. It includes an advanced search function that enables users to filter data based on multiple criteria for precise data exploration and supports exporting filtered data to Excel for enhanced analysis and reporting. Additionally, AA GAMA - Evaluator offers GIS capabilities to visualize data effectively, providing a spatial context to the information.

AA GAMA - Evaluator Screenshot Examples



Using spatial intelligence to profile the data within our defined location.

Download [Select All](#) | [Unselect All](#) ✕

<p>PARCEL</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Area <input checked="" type="checkbox"/> Assessment Year <input checked="" type="checkbox"/> Building Count <input checked="" type="checkbox"/> Class <input checked="" type="checkbox"/> Folio Key <input type="checkbox"/> ID <input checked="" type="checkbox"/> Jurisdiction <input checked="" type="checkbox"/> LINC Number <input checked="" type="checkbox"/> Last Updated <input checked="" type="checkbox"/> Livable Area (sf) <input checked="" type="checkbox"/> Location Description <input checked="" type="checkbox"/> Lot <input checked="" type="checkbox"/> Non Livable Area (sf) <input checked="" type="checkbox"/> Open Permit Count <input checked="" type="checkbox"/> Owner Count <input checked="" type="checkbox"/> PUC <input checked="" type="checkbox"/> Permit Count <input checked="" type="checkbox"/> Property Status Code <input checked="" type="checkbox"/> Range <input checked="" type="checkbox"/> Regression Model <input checked="" type="checkbox"/> SIMS ID <input checked="" type="checkbox"/> Section <input checked="" type="checkbox"/> Spatial <input checked="" type="checkbox"/> Status 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Subdivision <input checked="" type="checkbox"/> System Tags <input checked="" type="checkbox"/> Township <input checked="" type="checkbox"/> Unit Count <input checked="" type="checkbox"/> Workflow Tags <p>SITUS ADDRESS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> City <input checked="" type="checkbox"/> Country <input checked="" type="checkbox"/> PO Box <input checked="" type="checkbox"/> Post Direction <input checked="" type="checkbox"/> Primary <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Street Direction <input checked="" type="checkbox"/> Street Name <input checked="" type="checkbox"/> Street Number <input checked="" type="checkbox"/> Street Type <input checked="" type="checkbox"/> Unit Number <input checked="" type="checkbox"/> Unit Type <input checked="" type="checkbox"/> ZIP Code 	<p>LEGAL DESCRIPTION</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Plan <input checked="" type="checkbox"/> Block <input checked="" type="checkbox"/> LSD <input checked="" type="checkbox"/> Quarter <input checked="" type="checkbox"/> Meridian <p>MARKET AREA</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Market Area <input checked="" type="checkbox"/> Market Neighborhood 	<p>MAILING ADDRESS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> City <input checked="" type="checkbox"/> Country <input checked="" type="checkbox"/> PO Box <input checked="" type="checkbox"/> Post Direction <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Street Address 1 <input checked="" type="checkbox"/> Street Address 2 <input checked="" type="checkbox"/> Street Direction <input checked="" type="checkbox"/> Street Name <input checked="" type="checkbox"/> Street Number <input checked="" type="checkbox"/> Street Type <input checked="" type="checkbox"/> Unit Number <input checked="" type="checkbox"/> Unit Type <input checked="" type="checkbox"/> ZIP Code <p>LAND</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Land Number <input checked="" type="checkbox"/> Land Size <input checked="" type="checkbox"/> Land Use <input checked="" type="checkbox"/> Predominant 	<p>VALUE</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Data Migration FCV <input checked="" type="checkbox"/> Data Migration Impr. Value <input checked="" type="checkbox"/> Data Migration Land Value <input checked="" type="checkbox"/> FCV Assessed <input checked="" type="checkbox"/> Improvement Value <input checked="" type="checkbox"/> LPV <input checked="" type="checkbox"/> LPV Assessed <input checked="" type="checkbox"/> Land Value <input checked="" type="checkbox"/> Primary <input checked="" type="checkbox"/> Total Market Value <p>COMMERCIAL BUILDING</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Class <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Floor <input checked="" type="checkbox"/> Livable Area <input checked="" type="checkbox"/> Non Livable Area <input checked="" type="checkbox"/> Occupancy <input checked="" type="checkbox"/> Proportion Complete <input checked="" type="checkbox"/> Quality <input checked="" type="checkbox"/> Total Area <input checked="" type="checkbox"/> Year Built 	<p>RESIDENTIAL BUILDING</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Class <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Effective Year <input checked="" type="checkbox"/> Floor <input checked="" type="checkbox"/> Livable Area <input checked="" type="checkbox"/> Non Livable Area <input checked="" type="checkbox"/> Occupancy <input checked="" type="checkbox"/> Proportion Complete <input checked="" type="checkbox"/> Quality <input checked="" type="checkbox"/> Total Area <input checked="" type="checkbox"/> Year Built <p>OWNERSHIP</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Alias <input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Owner ID <input checked="" type="checkbox"/> Phone Number <input checked="" type="checkbox"/> Primary <input checked="" type="checkbox"/> Redacted <p>LAND CLASS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Land Legal Class
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Ability to download data right from the application after profiling the data spatially

Key Items

- Comprehensive Data Profiling and Filtering: AA GAMA - Evaluator allows users to profile appraisal and sales information based on various criteria. This gives the users the ability to profile characteristics at the time of sale versus current property characteristics.

- Advanced Statistical Analysis: The system's profile reports provide a wide range of statistical functions such as lows and highs, mean, median, averages, all that can be populated and displayed within a GIS environment.
- Efficient and Linked Profiling: AA GAMA - Evaluator allows the user to save the information that has been profiled for future reference and then can link those profiles together in a GIS environment.

Summary

- AA GAMA - Evaluator offers robust data profiling tools and can offer spatial intelligence through the power of GIS to better understand your data prior to analysis. With spatial intelligence able to link multiple analysis together that have similar features.
- This powerful profiling tool can be exported to Excel for additional details and an analysis.
- This type of profiling tool is inherent in our application and our team would work with the project team to ensure that the configurations aligned with your business process.

Description of AA GAMA - Evaluator Functionality

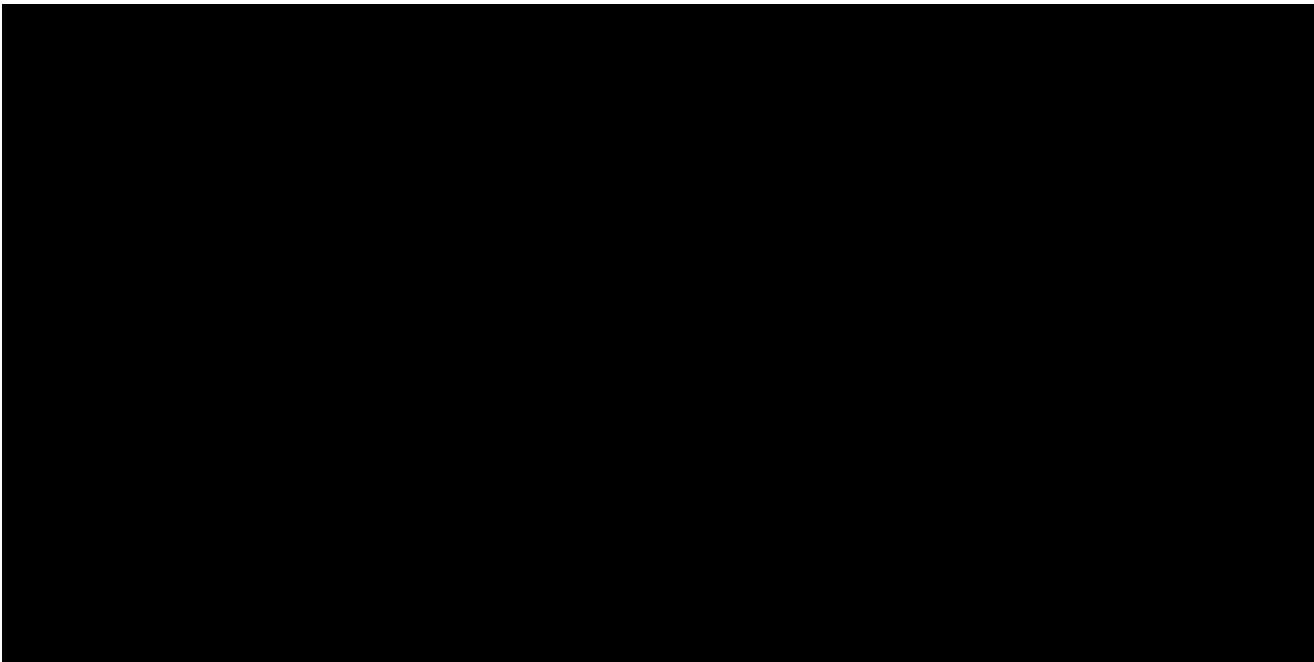
RFP Item: 35

RFP Table Title: GIS Connectivity Capabilities and Advantages

Overall Description

AA GAMA - Evaluator features advanced spatial analytics ability by allowing users to add and display geospatial data from different sources. AA GAMA - Evaluator can be connected to GIS layers as it uses Esri's spatial services and web maps. Users can analyze, visualize and label various spatial data fields and attributes on the map. It also includes spatial search function that enables users to filter and visualize data based on spatial area selection.

AA GAMA - Evaluator Screenshot Examples





Ability to perform Statistical Analysis using Spatial Location and assessment Data stored in SQL database.

Key Items

- Application integrates with multiple data sources: AA GAMA - Evaluator allows users to add geospatial data [redacted] for further enhanced analysis.
- Switch between Aerial imagery and other Basemaps: AA GAMA - Evaluator includes the functionality to load different base maps provided by default from Esri. The system allows user to switch between basemaps like aerial imagery, topographic, street view for comparative analysis.

- Bookmark specific properties: AA GAMA - Evaluator allows the user to save the information on map as custom bookmarks for user to return and continue the spatial analysis of properties later in time.

Summary

AA GAMA - Evaluator offers power of GIS to capture, manage, analyze, and display spatial or geographic data for analysis of spatial relationships, patterns, and trends within assessment data

Description of AA GAMA - Evaluator Functionality

RFP Item: 36

RFP Table Title: Portable Field Devices Capabilities and Advantages

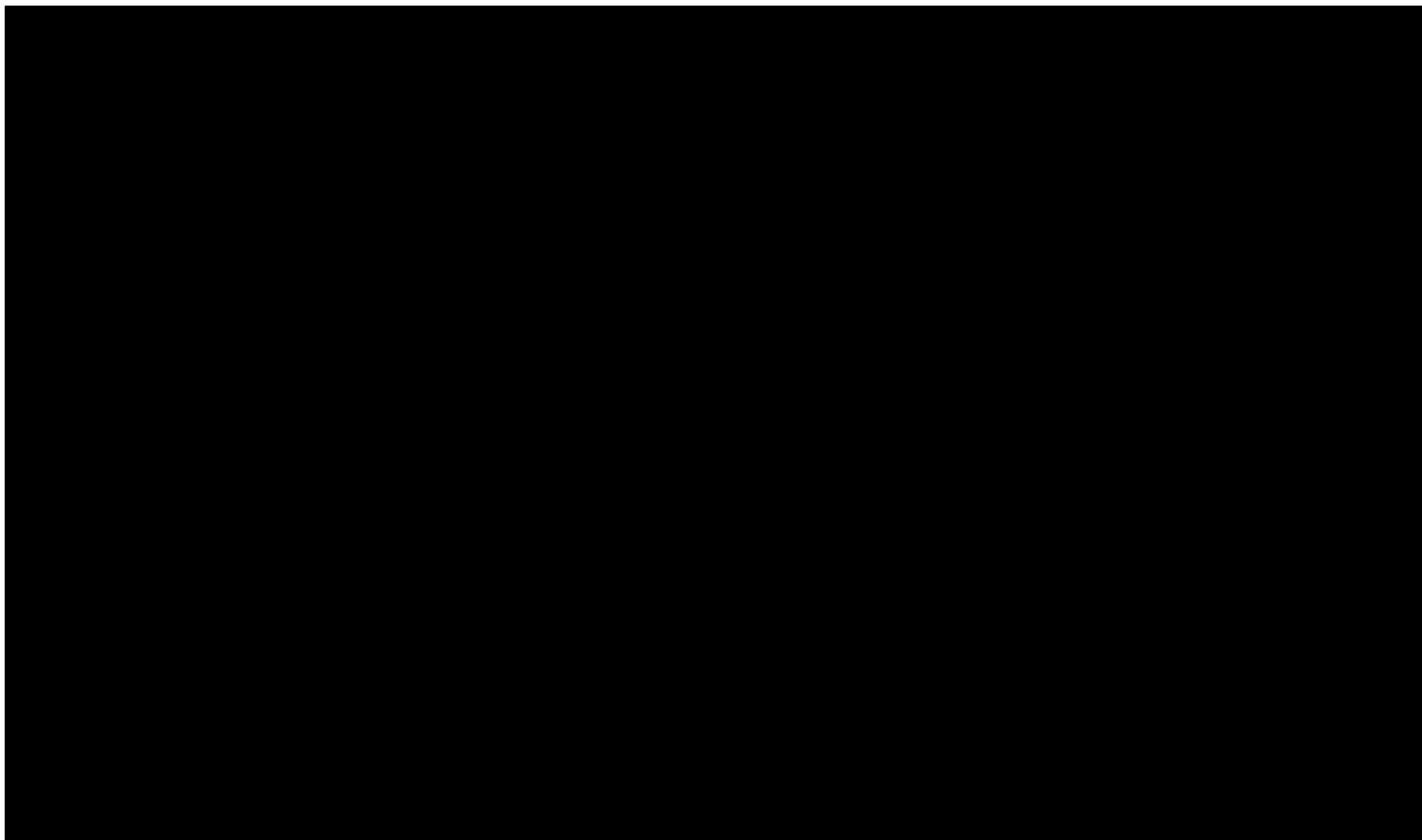
Overall Description

AA GAMA - Evaluator is designed and developed using the Esri’s technology and concept of standard data format across the applications. The benefits of using standard data format are that it enables usage of same geospatial data across different Esri’s application suites including [REDACTED] can be used stand-alone or in combination to support field workflows and enable office and field personnel to work in unison, using the same authoritative data.

AA GAMA - Evaluator Screenshot Examples



Field Maps



Key Items

- Custom Maps: Create a map for mobile workers to use in [REDACTED] from centralized spatial data
- Offline Editing: [REDACTED]
[REDACTED]

Summary

[REDACTED]
[REDACTED]
[REDACTED]

Description of AA GAMA - Evaluator Functionality

RFP Item: 37

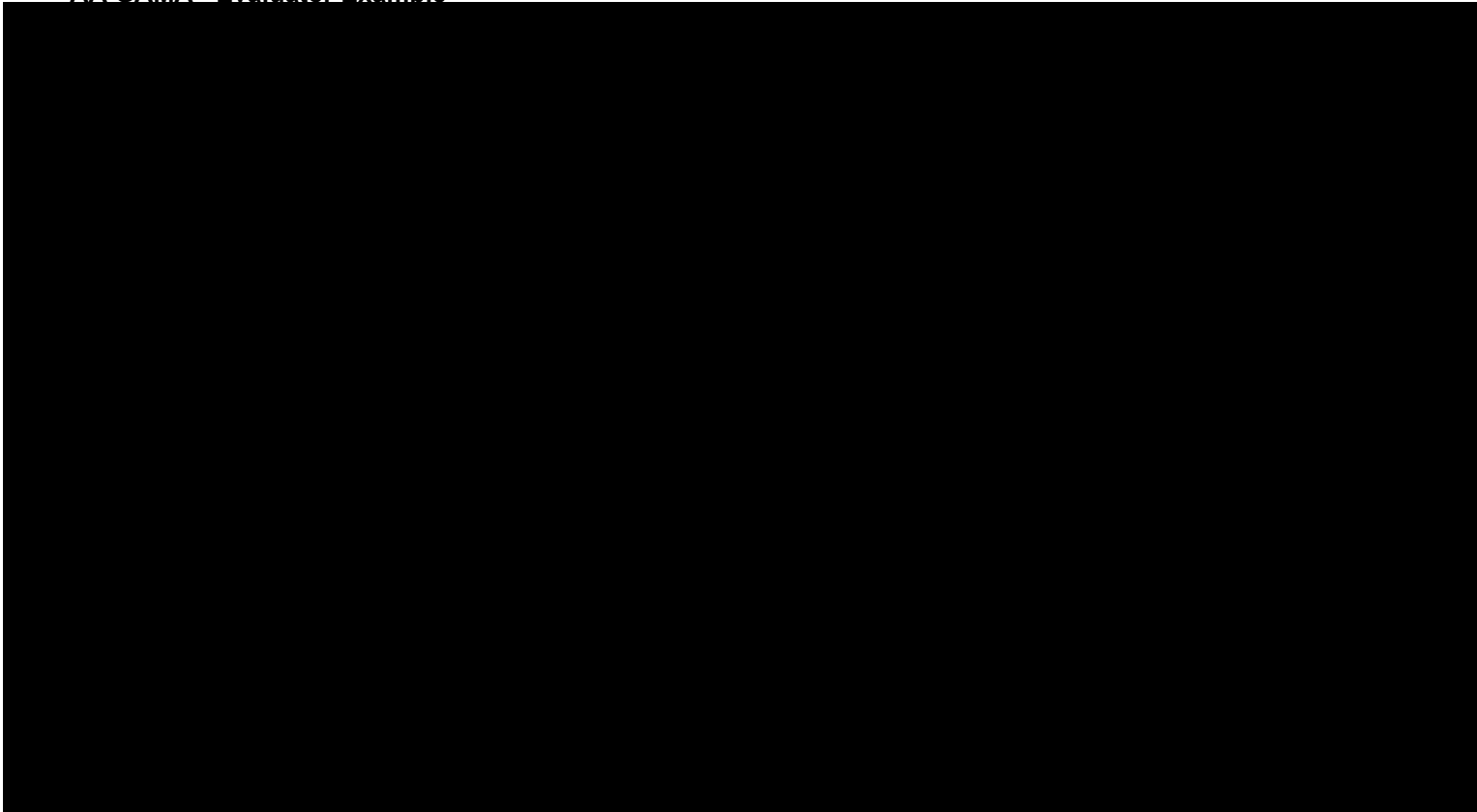
RFP Table Title: Internet Capabilities and Advantages

Overall Description

AA GAMA - Evaluator, seamlessly [REDACTED] empowers stakeholders, including homeowners and agents, to submit applications online, which are then seamlessly accessible within AA GAMA - Evaluator. Leveraging [REDACTED] offers extensive opportunities to manage related functionalities and populate pertinent information directly within the application. This integration enables adaptable applications that can evolve over time to align with evolving business processes, harnessing the robust capabilities of the Esri platform. Moreover, AA GAMA - Evaluator ensures compliance with state laws by providing a separate ARB database for mandated users to review and inspect

necessary data. Also, using a reporting database that is updated nightly, can publish live data to a website based on the changes that occurred during the day.

AA GAMA - Evaluator Example



- Live Publishing of Appraisal Information: AA GAMA - Evaluator offers a reporting database that can be used for the publishing of data that can be made available to the internet or a publish website.
- Online Application Filing and Management: AA GAMA - Evaluator, in tandem with [REDACTED], enables taxpayers and agents to file various applications online, including HS exemption applications, non-HS applications, and BPP renditions, simplifying administrative tasks and enhancing accessibility.
- Support Ticket Management: With AA GAMA - Evaluator, we offer a support ticket system through an application called target process. This platform offers the ability to file support tickets that are handled by the Esri Canada staff and resolved based the severity level.

Summary

- To meet the outlined requirements, we will conduct detailed business analysis sessions to fully capture the necessary options for [REDACTED], the reporting database, and the ARB database. These sessions will also provide an overview of the target processes, including how to file support tickets.
- Our application, integrated with [REDACTED] offers an optimal platform for stakeholder engagement. [REDACTED] dedicated development team ensures an exceptional user experience for all stakeholders.
- By leveraging our thorough business analysis, seamless integration with the Esri platform, and synchronized databases within AA GAMA - Evaluator, we are confident in our ability to deliver all required functionalities effectively.

IX. PERFORMANCE GUIDELINES

38.Mass Processing	Yes	No	Cost to Modify
○ Does the application perform a full system recalculate with the benchmark property quantities in 4 hours or less?	Yes		
○ Has the application been tested with a full system recalculate with the benchmark property quantities in 4 hours or less?	Yes		
○ Does the application generate 200,000 residential sales comparable grids in 2 hours or less ?		No	■
○ Has the system been tested generating 200,000 residential sales comparable grids in 2 hours or less?		No	■
○ Does the application generate 200,000 residential equity comparable grids in 2 hours or less ?		No	■
○ Has the system been tested generating 200,000 residential equity grids in 2 hours or less?		No	■
○ Does the application generate and print entity totals for all entities in 1 hour or less?	Yes		

Description of AA GAMA - Evaluator Functionality

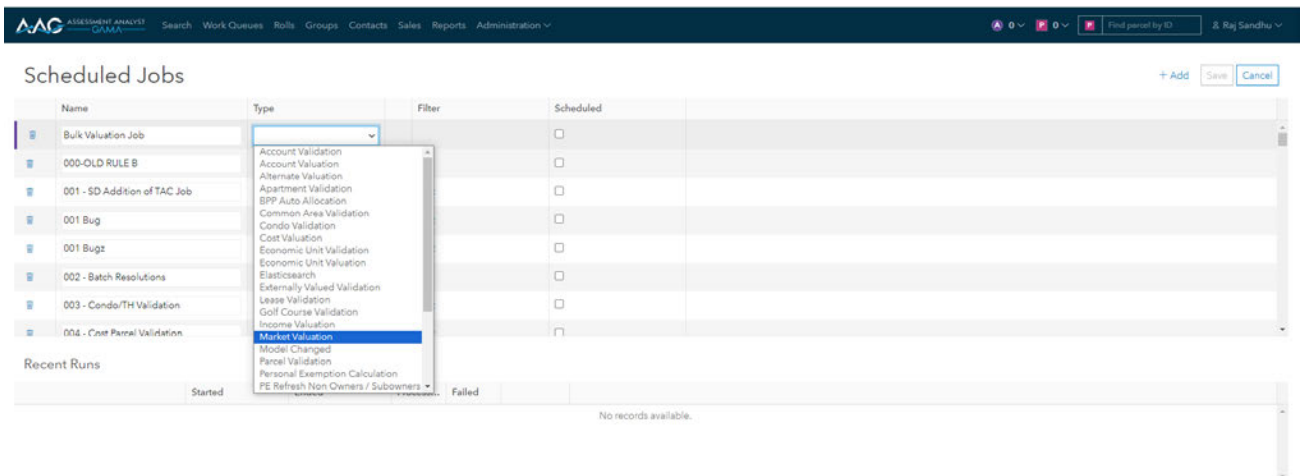
RFP Item: 38

RFP Table Title: Mass Processing Capabilities and Advantages

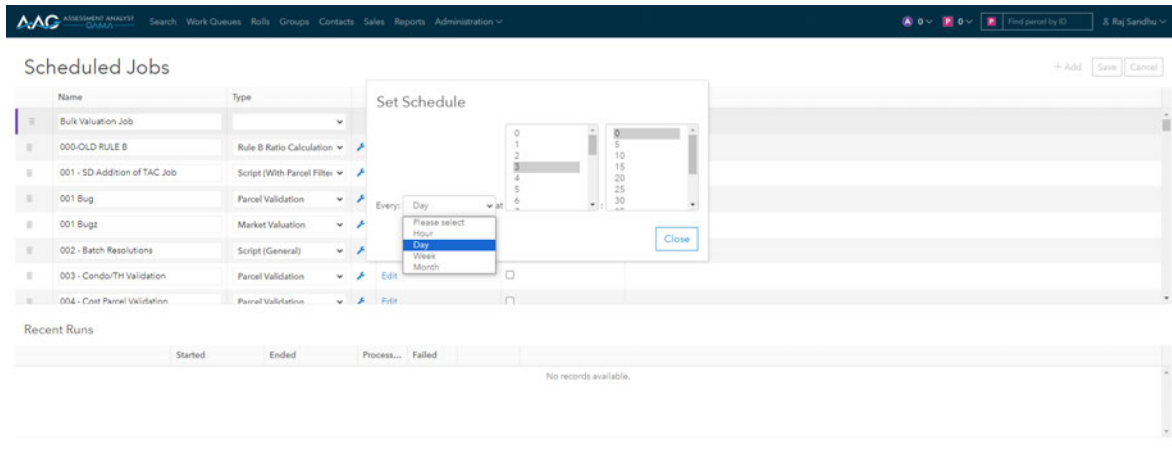
Overall Description

AA GAMA - Evaluator has a comprehensive bulk job processing tool that allows for mass valuations of property accounts. Users with sufficient privileges may run bulk valuation jobs of various sizes and segments based on their needs. The job can be scheduled to run in the future if required

AA GAMA - Evaluator Screenshot Examples



Bulk Job Menu



Bulk Job Scheduler

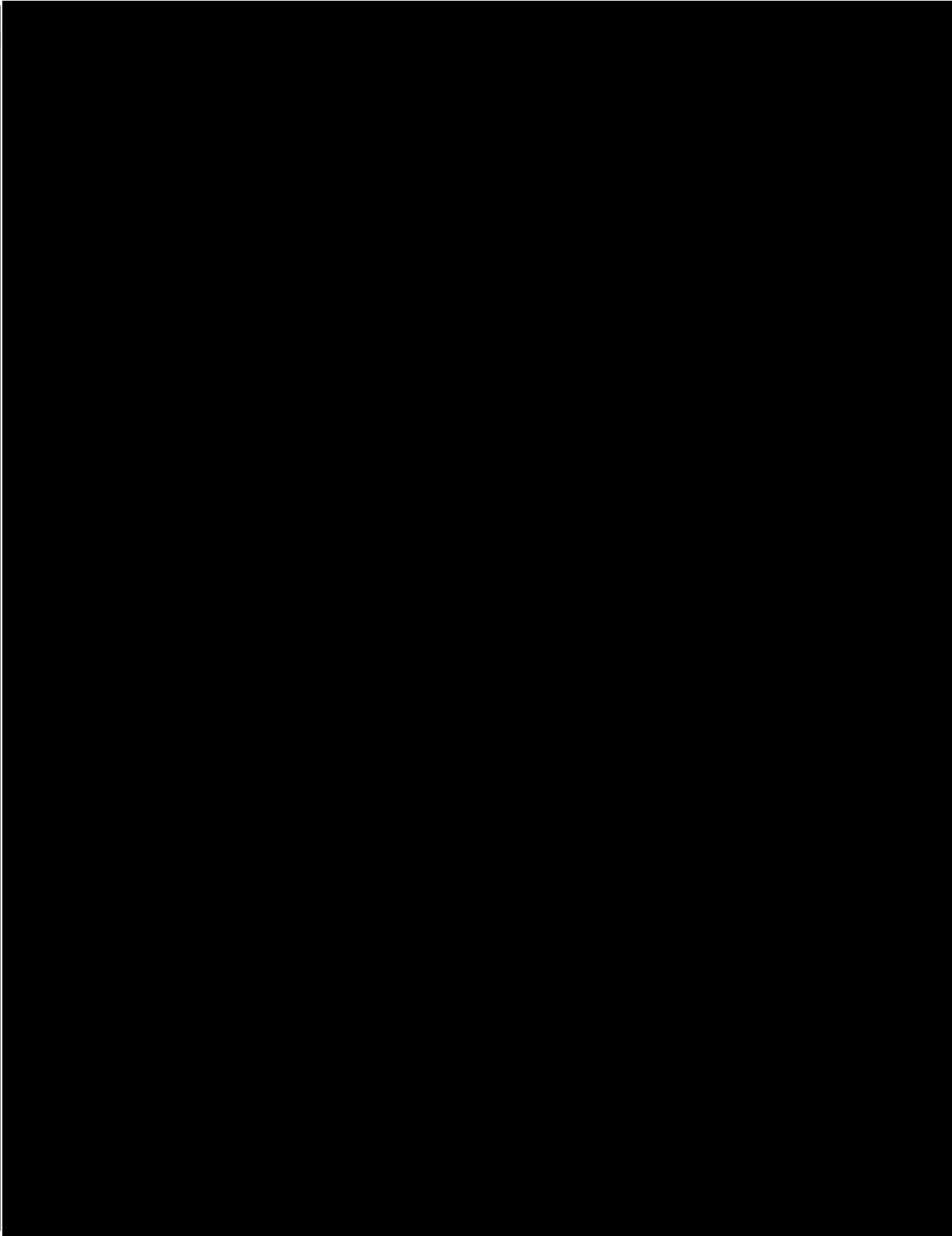
Key Items

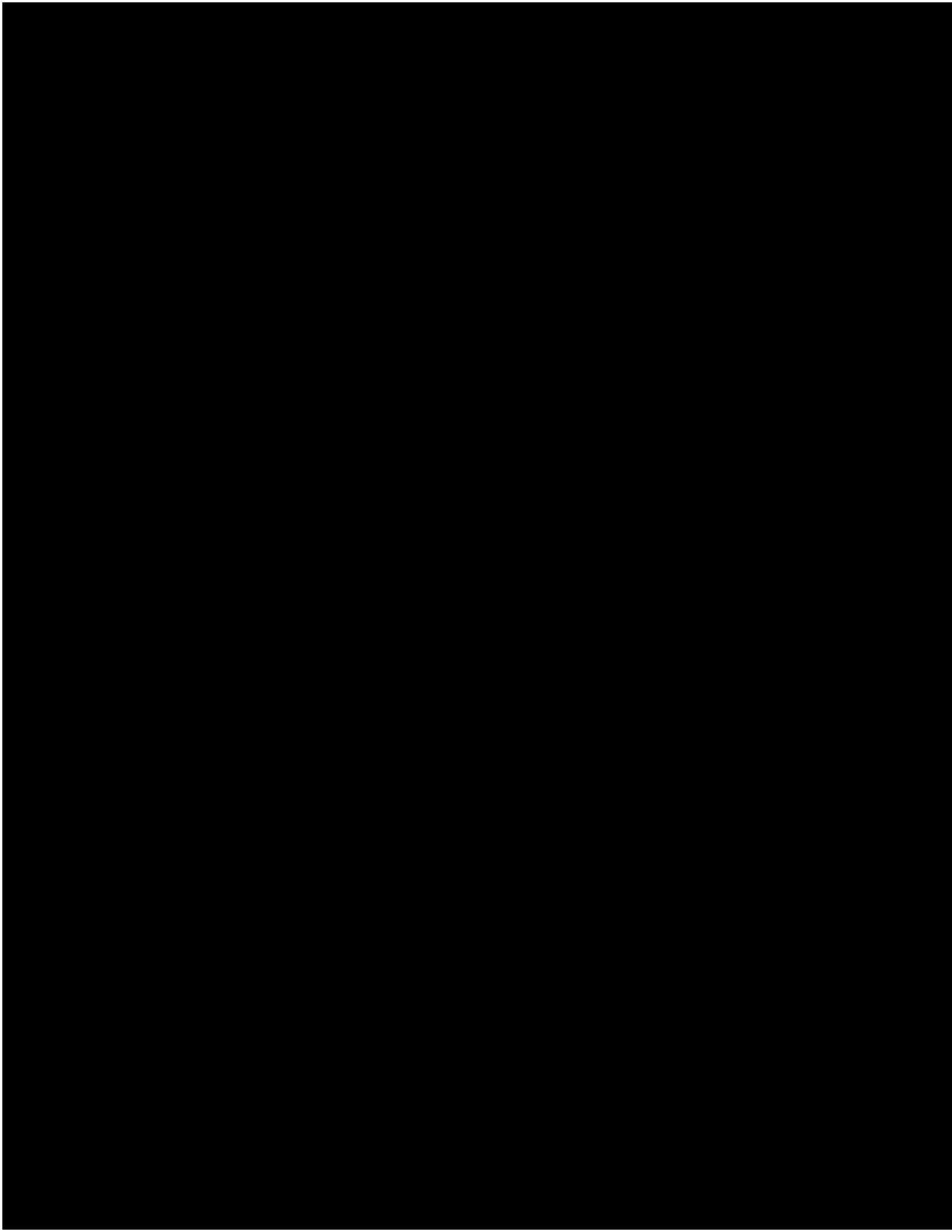
- Bulk job processing tool allows users to run processes in mass, including valuation.
- Bulk jobs can be run at any time or schedule in the future.
- Bulk jobs include error handling reports.
- Downstream reports can be configured as needed to meet business requirements.

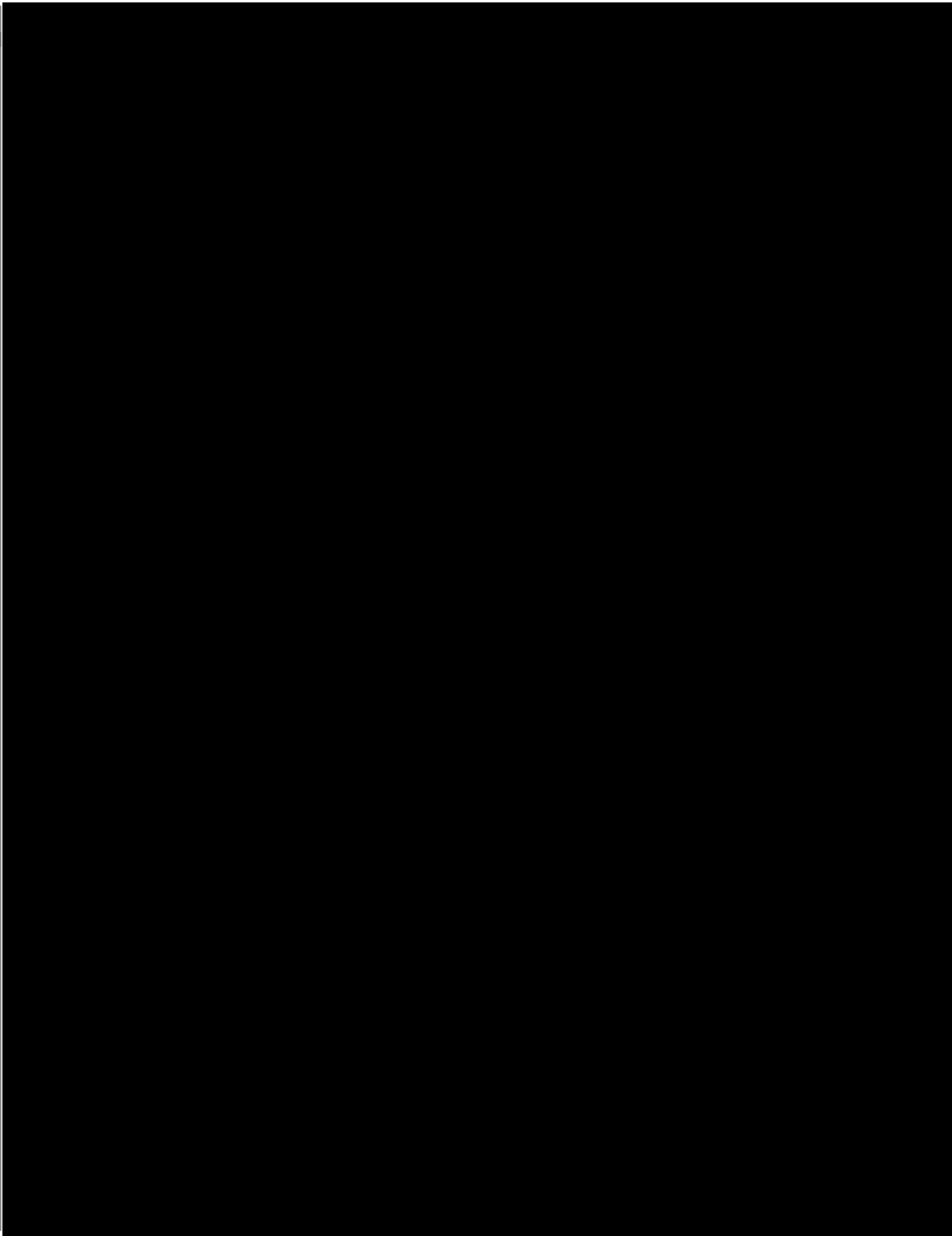
Summary

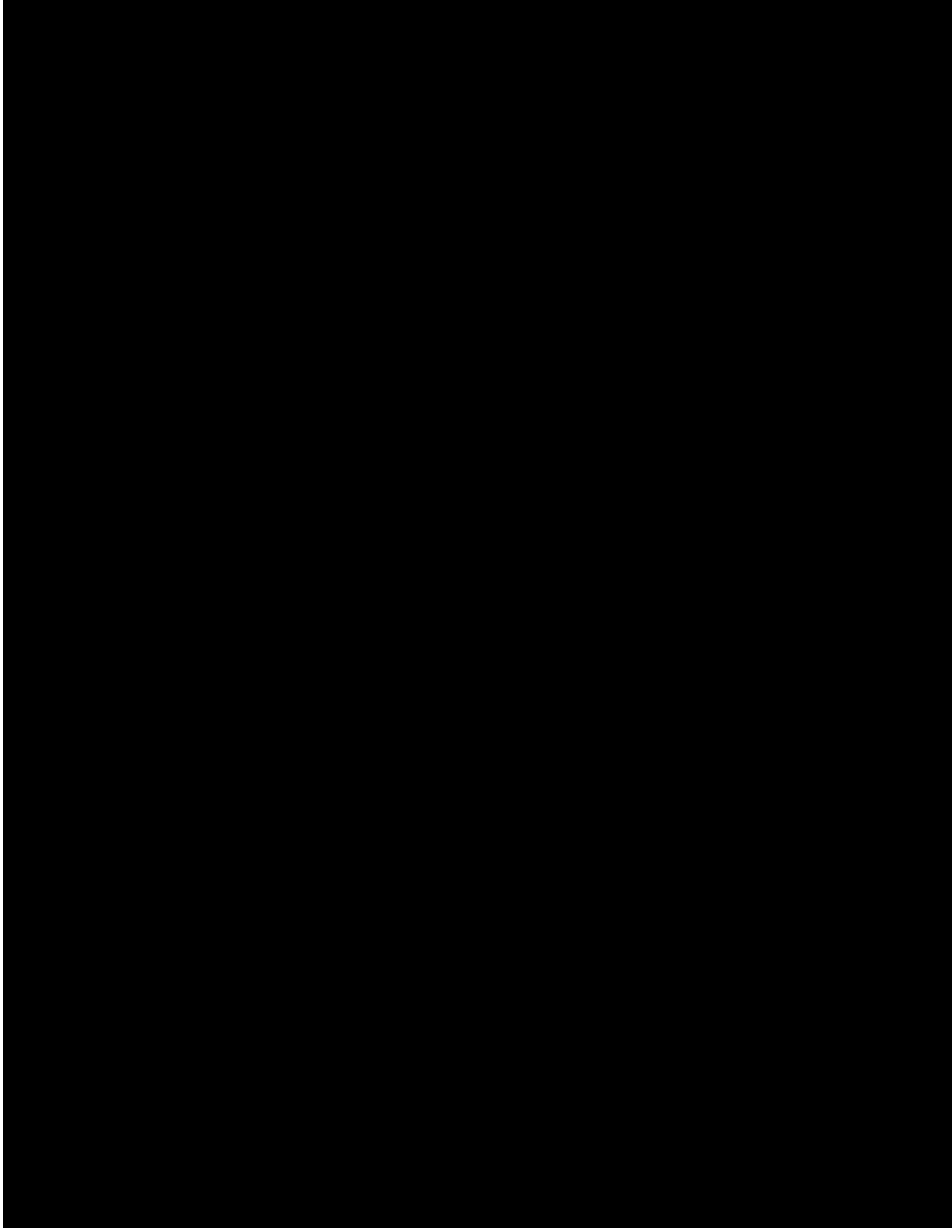
- Benchmark property quantities can be calculated in the required times.
- Requirements pertaining to comparable sales and equity grids will be met at no extra cost.

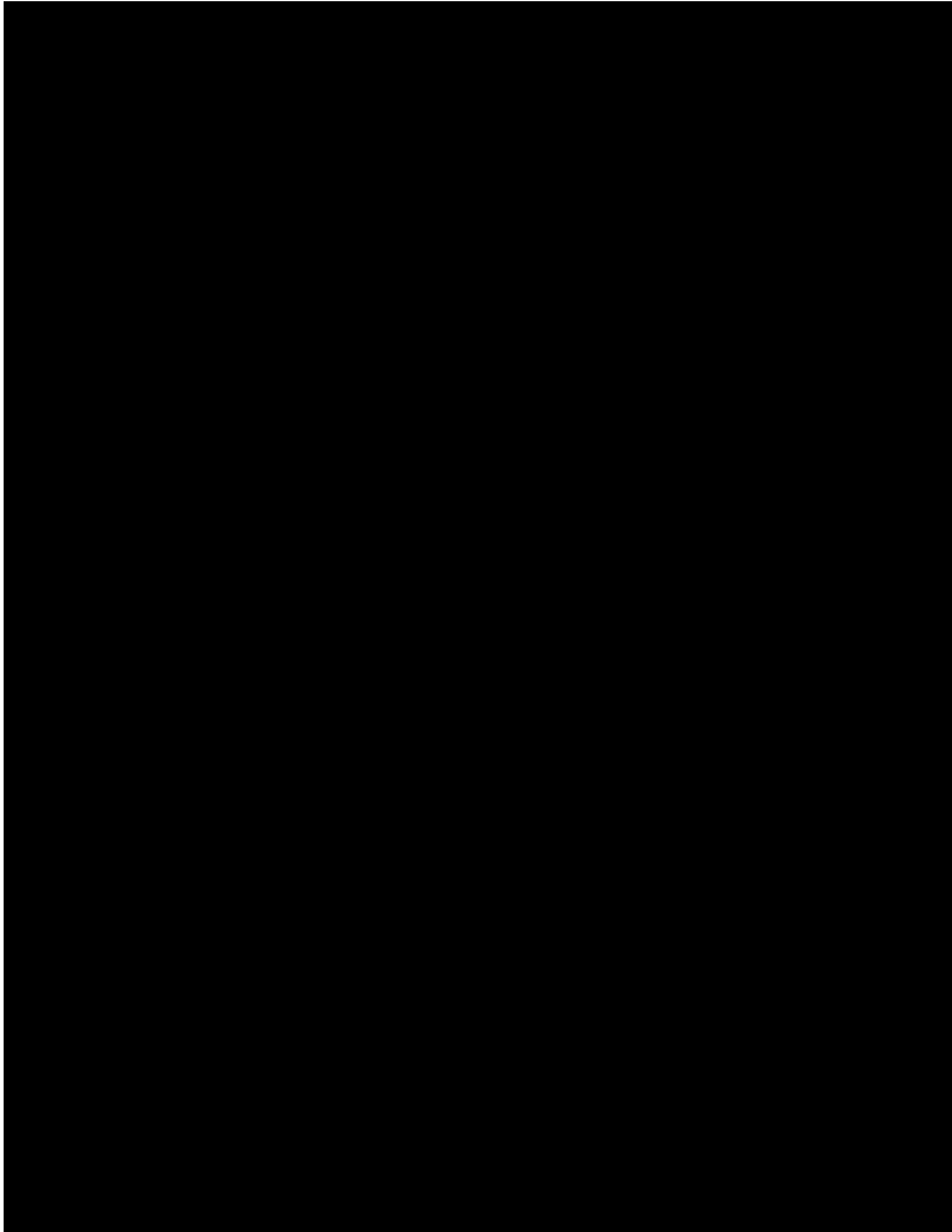
19. Detailed Workplan Tasks

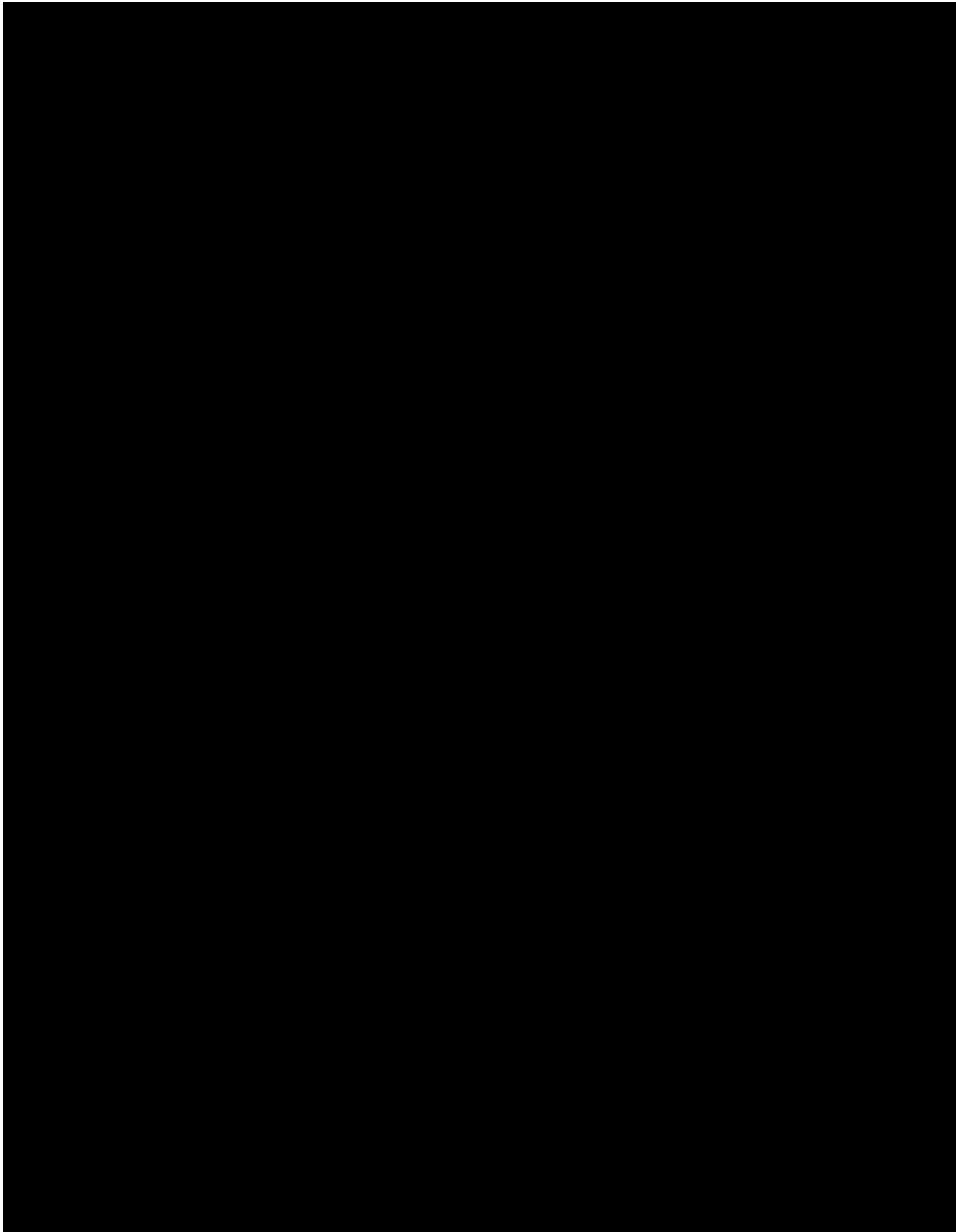


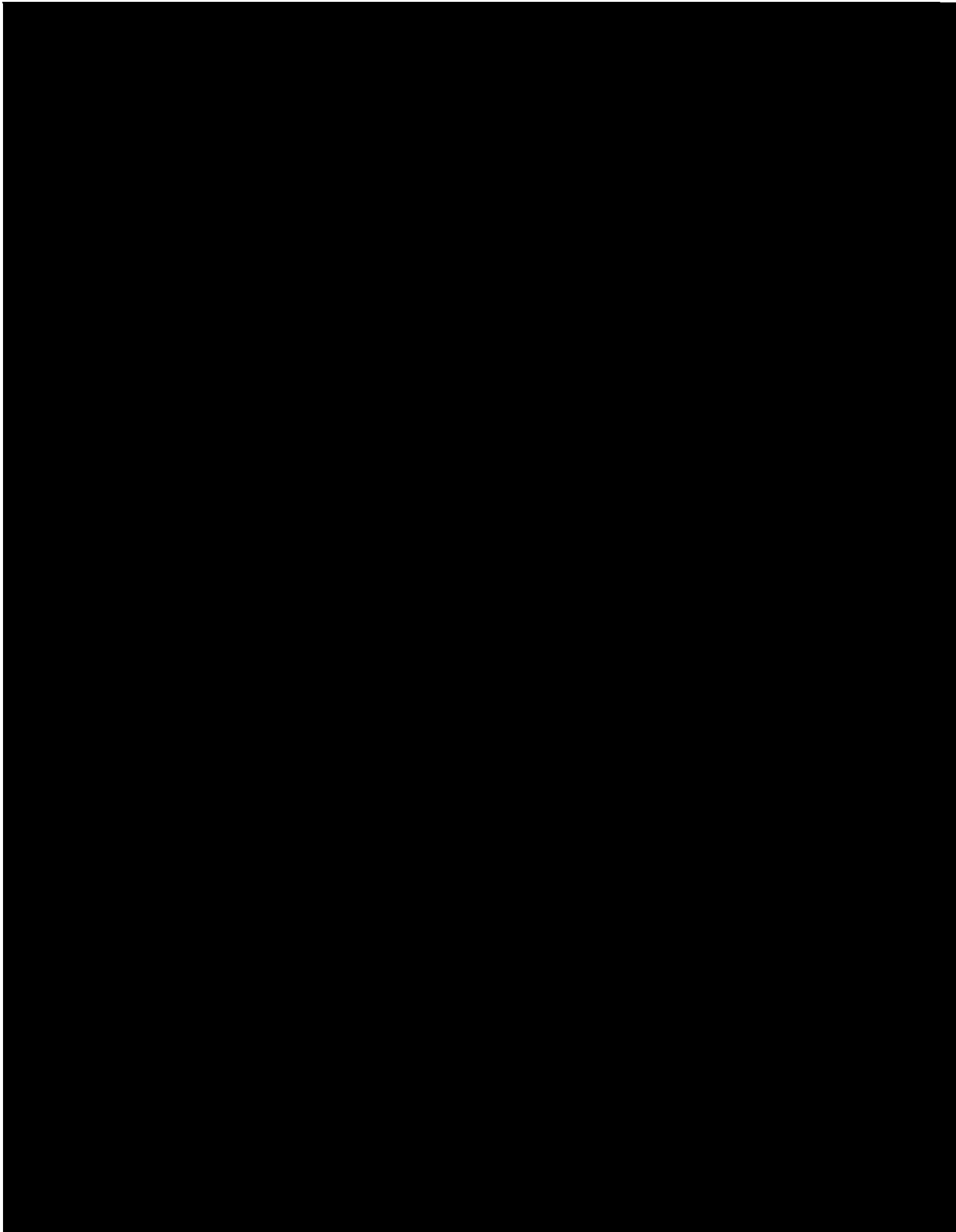


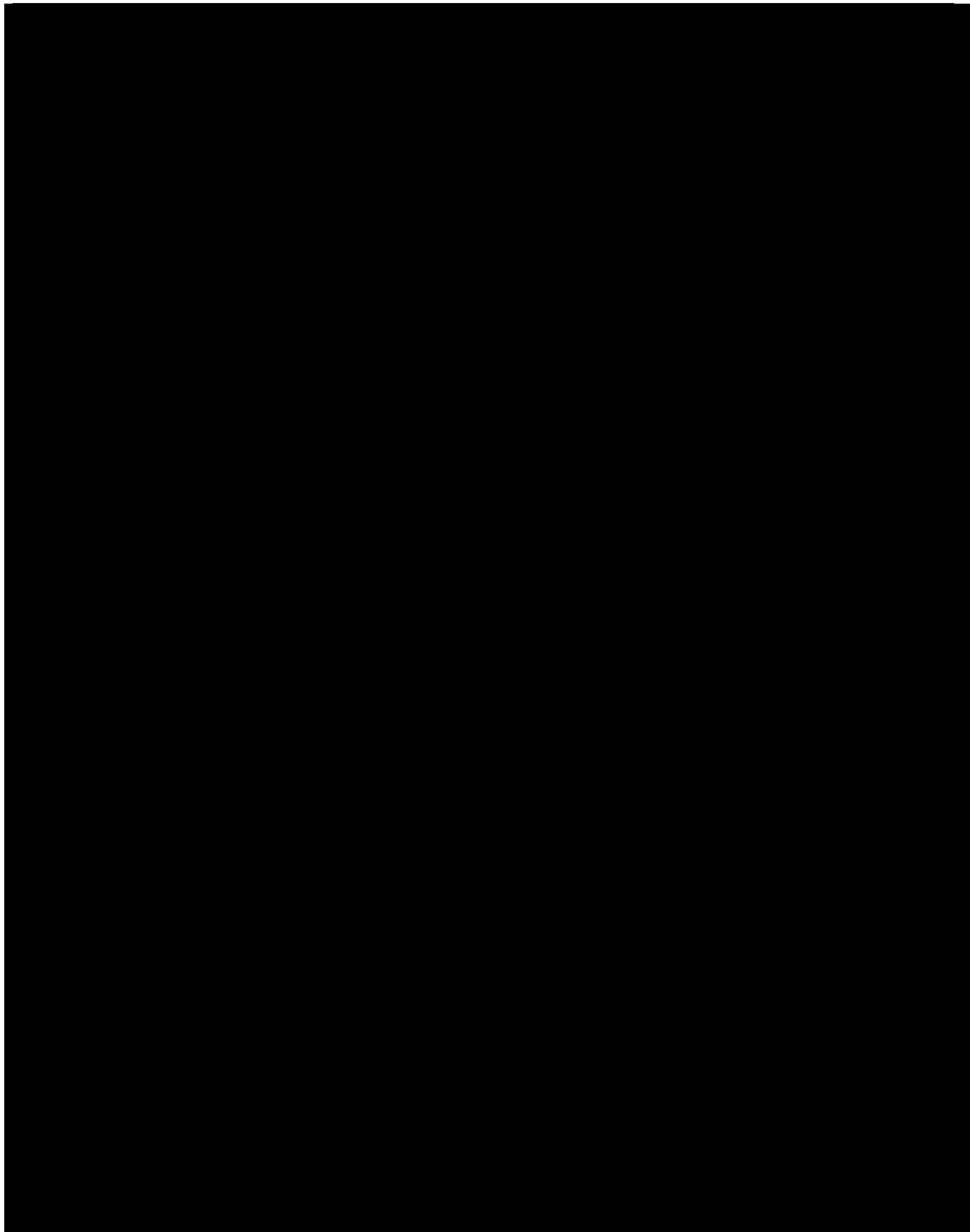




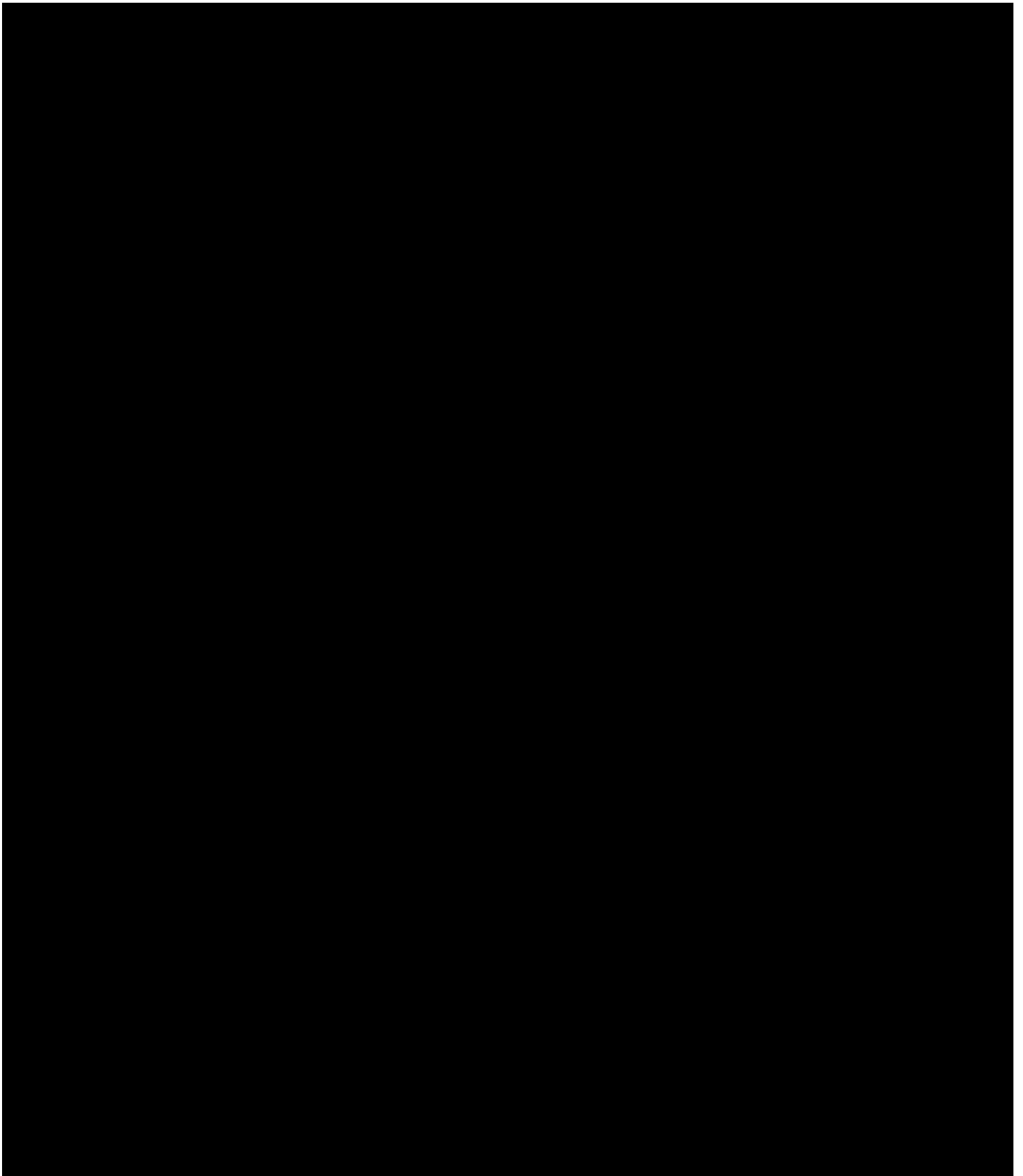


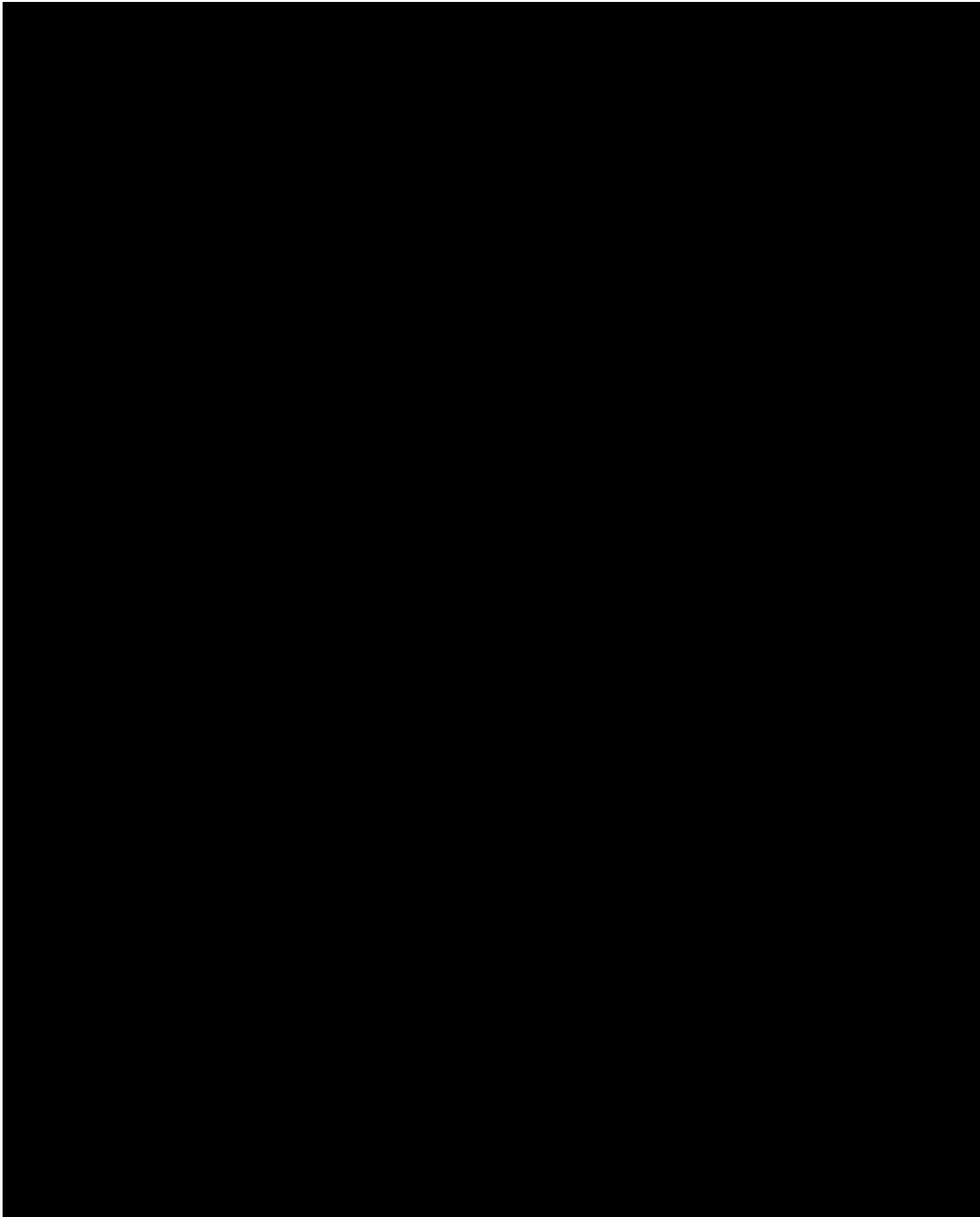


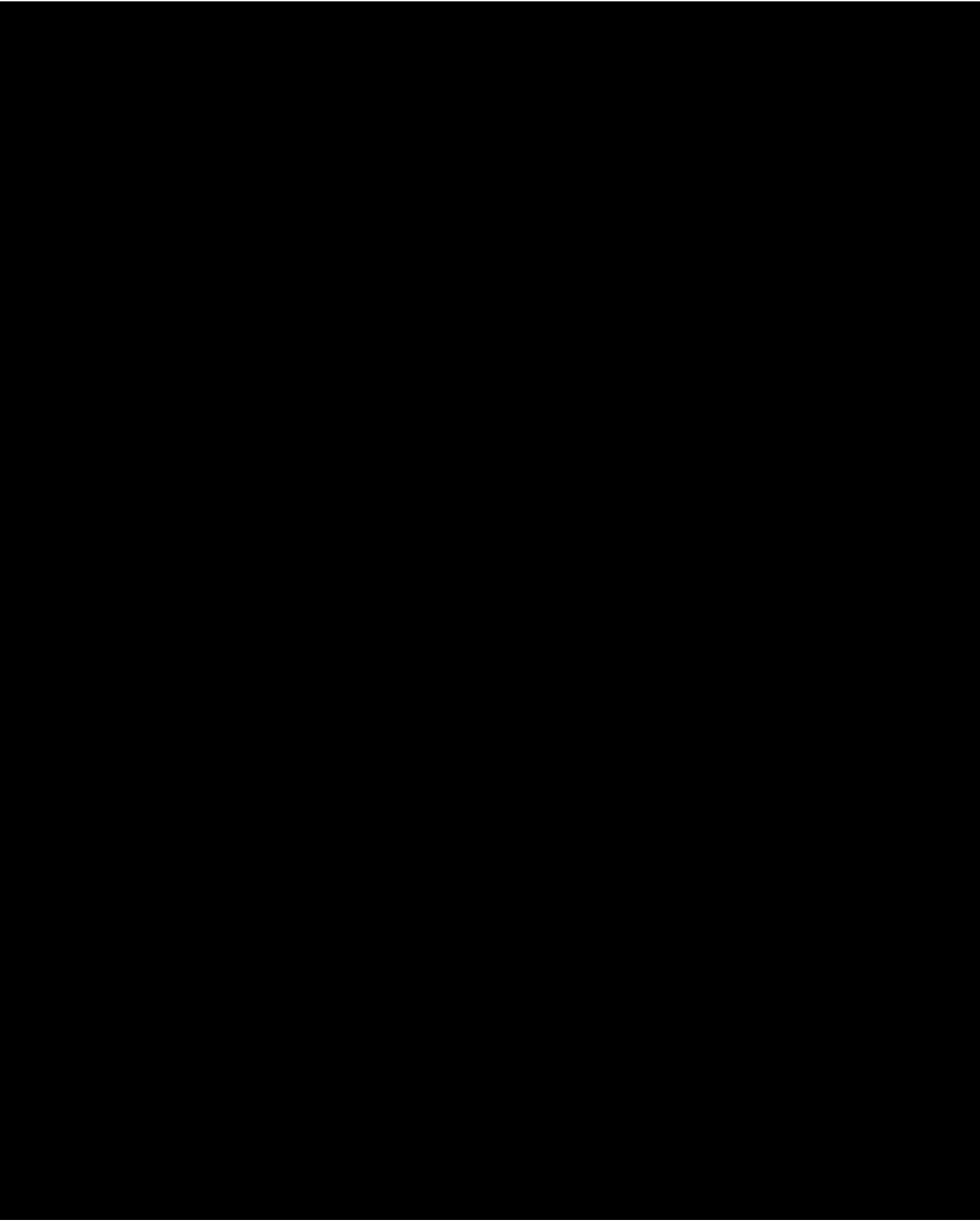


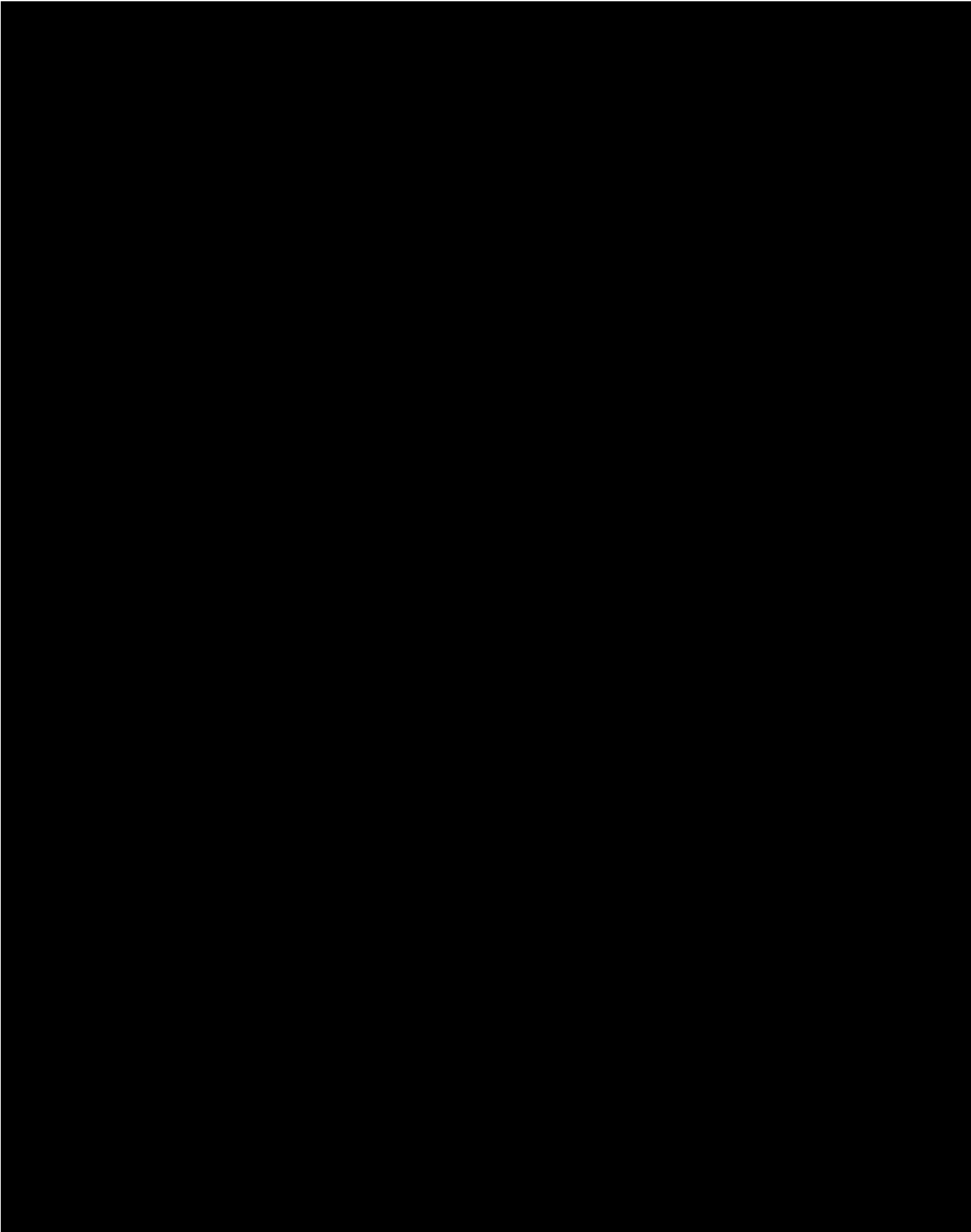


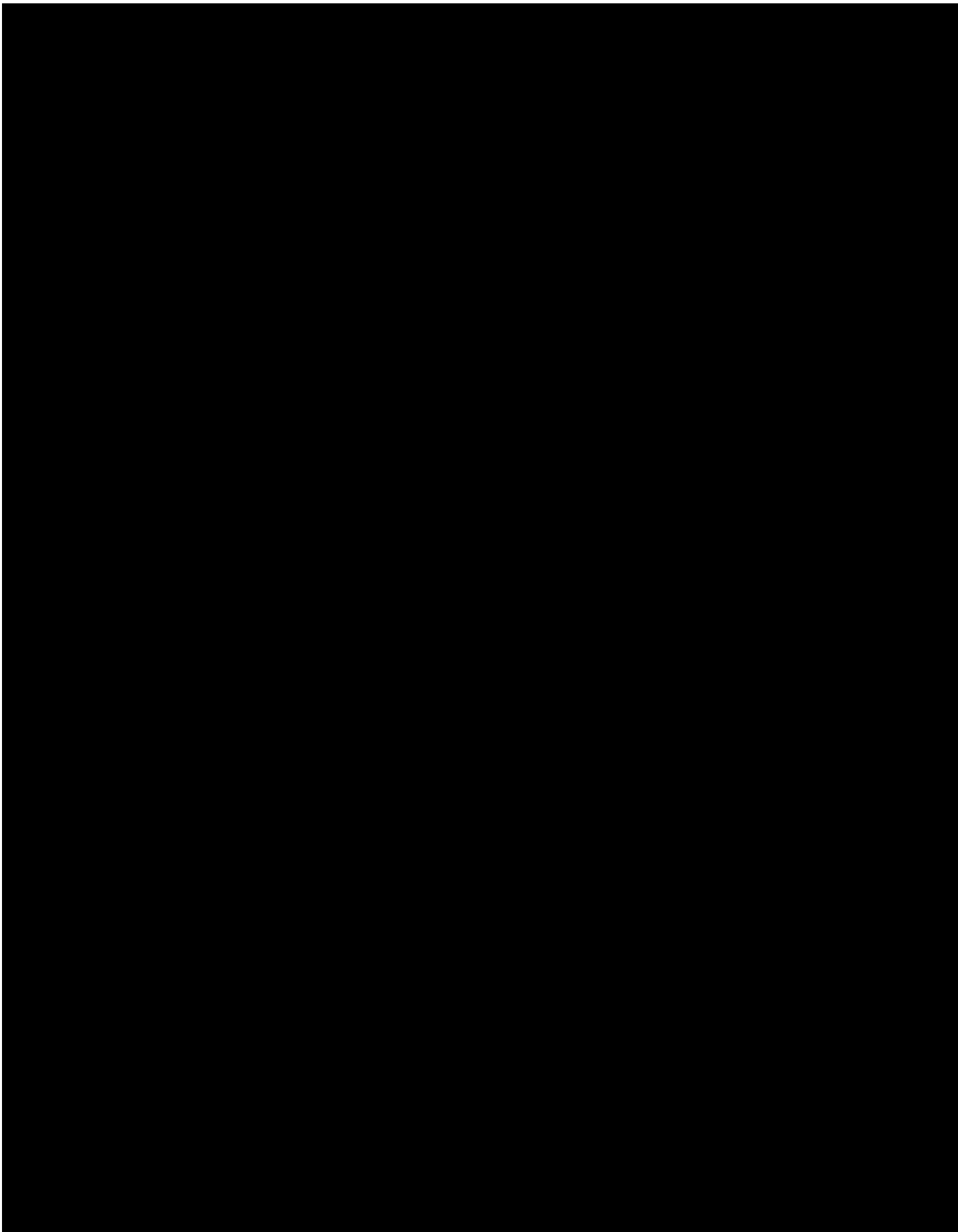
20. Sample Procurement Services Agreement

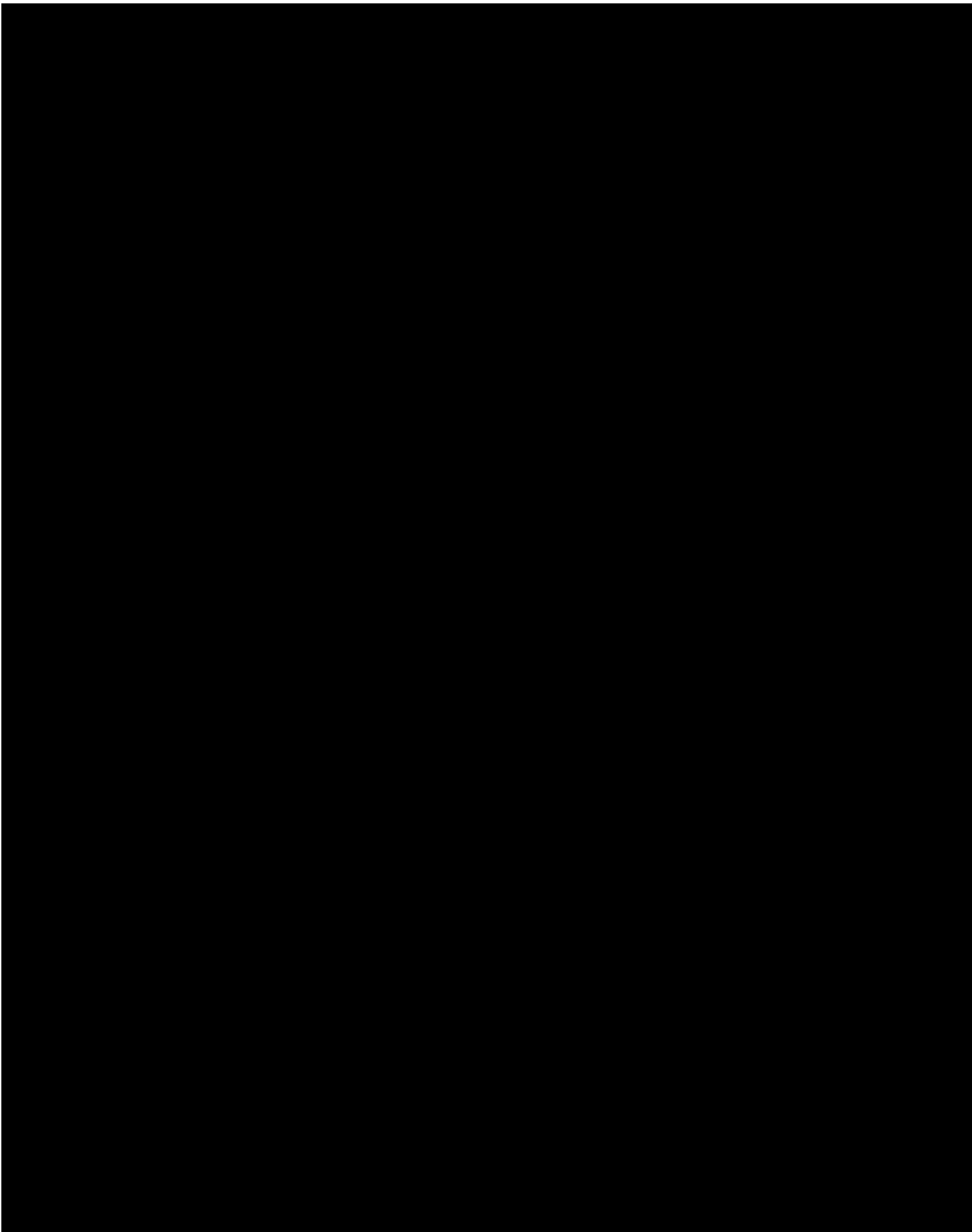


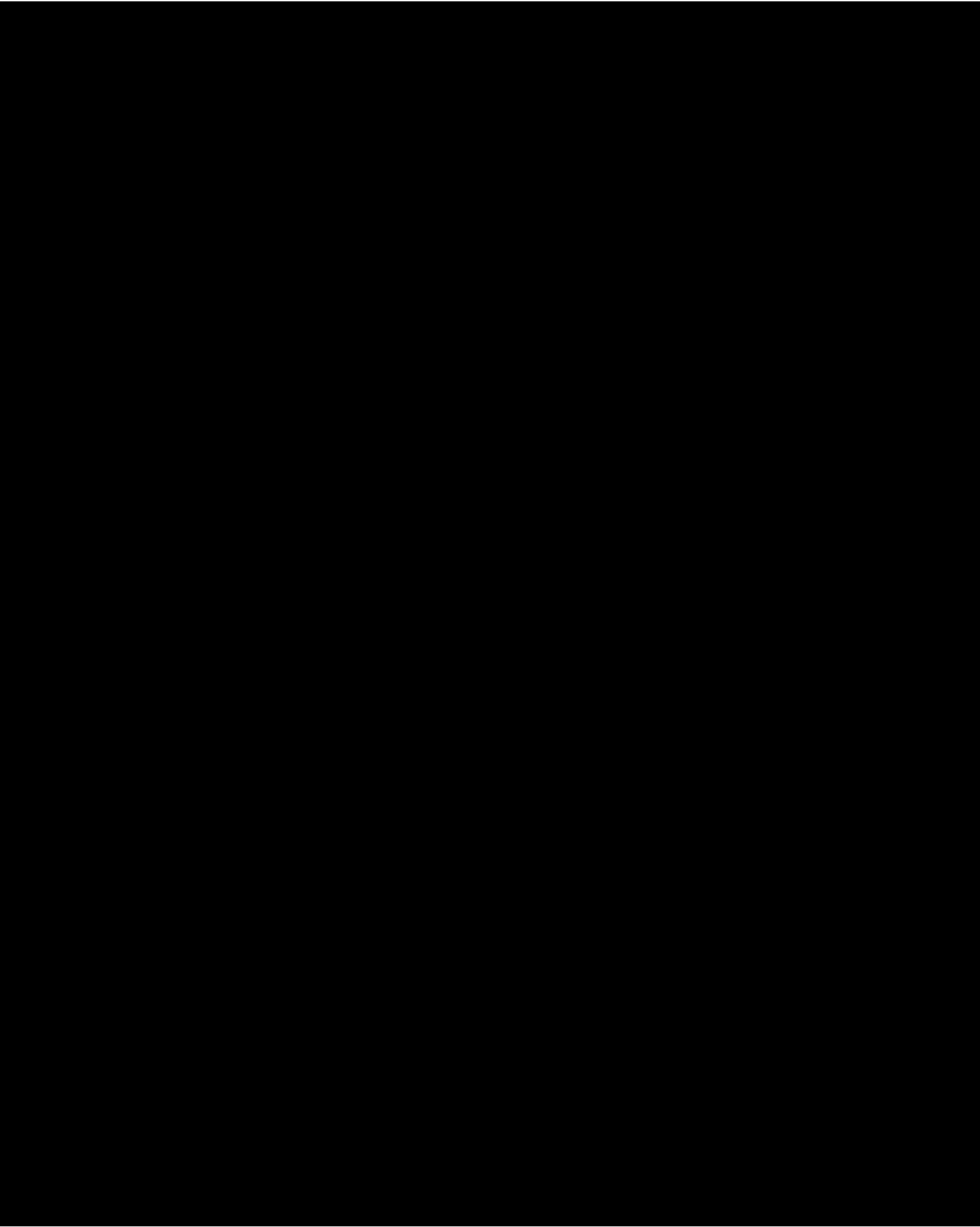


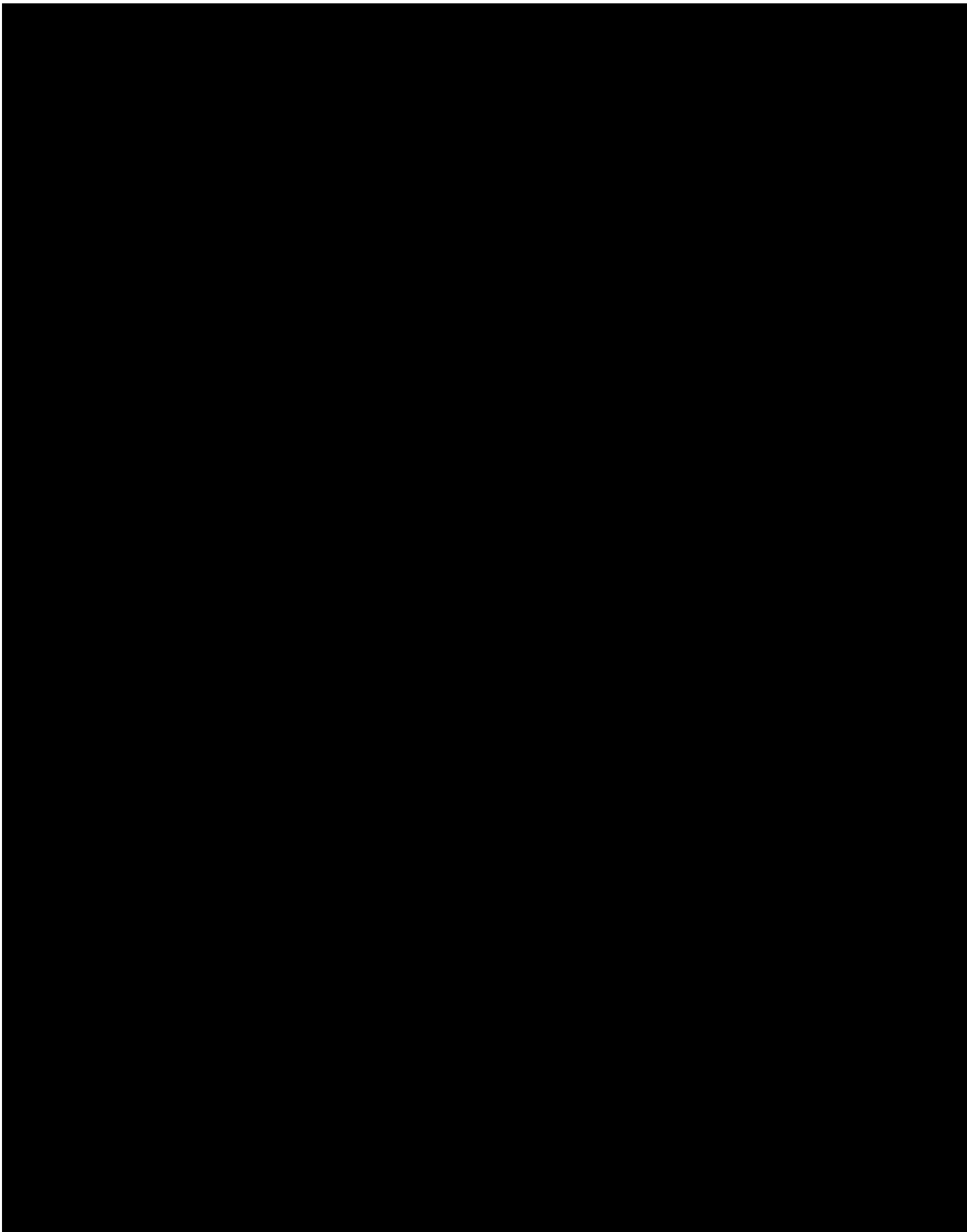


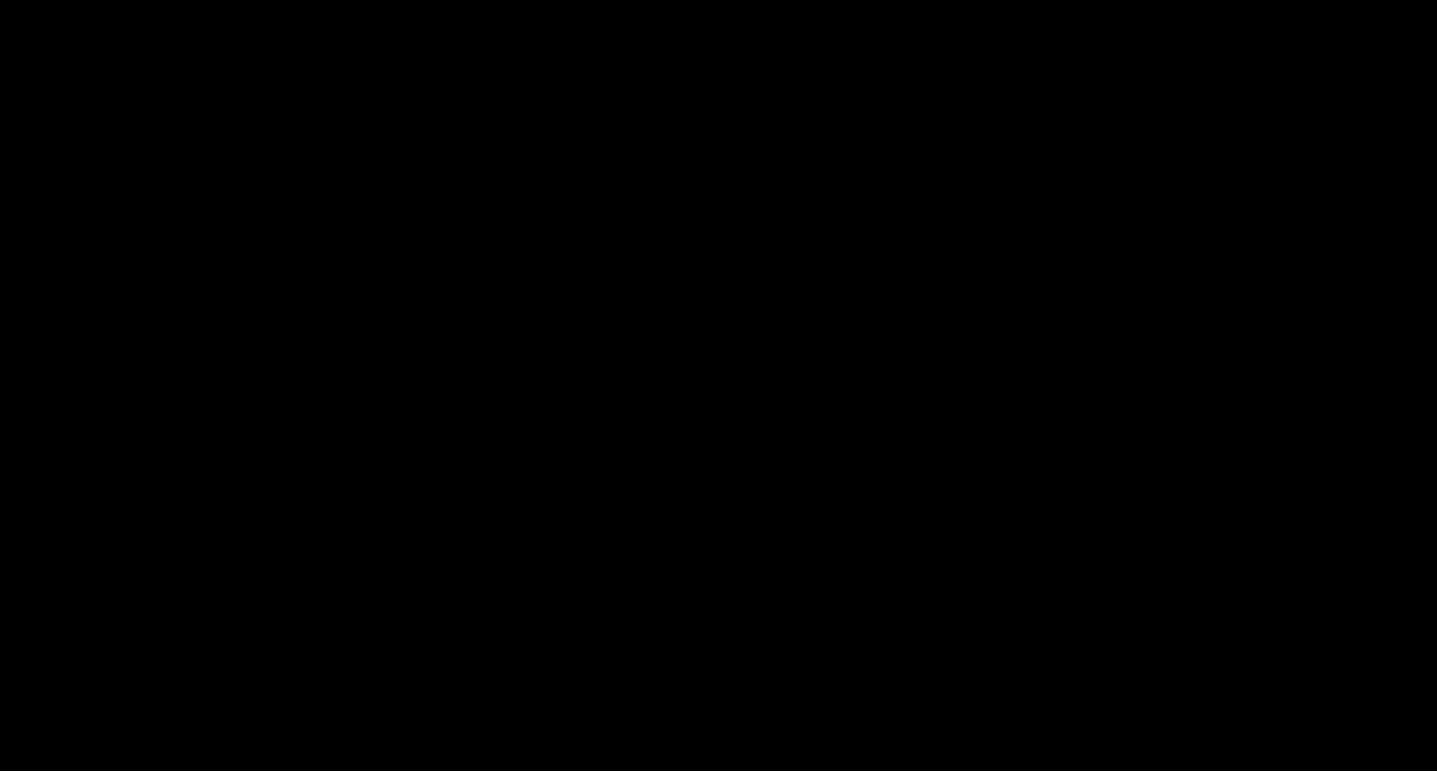








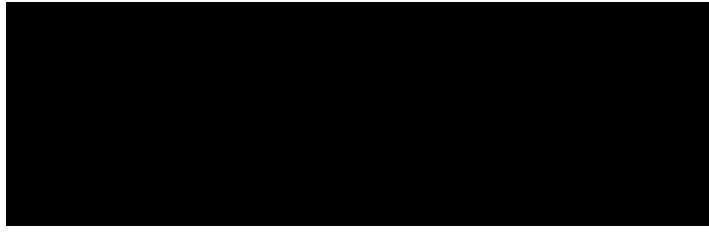




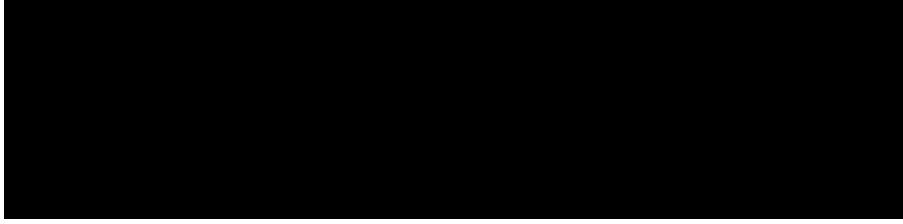
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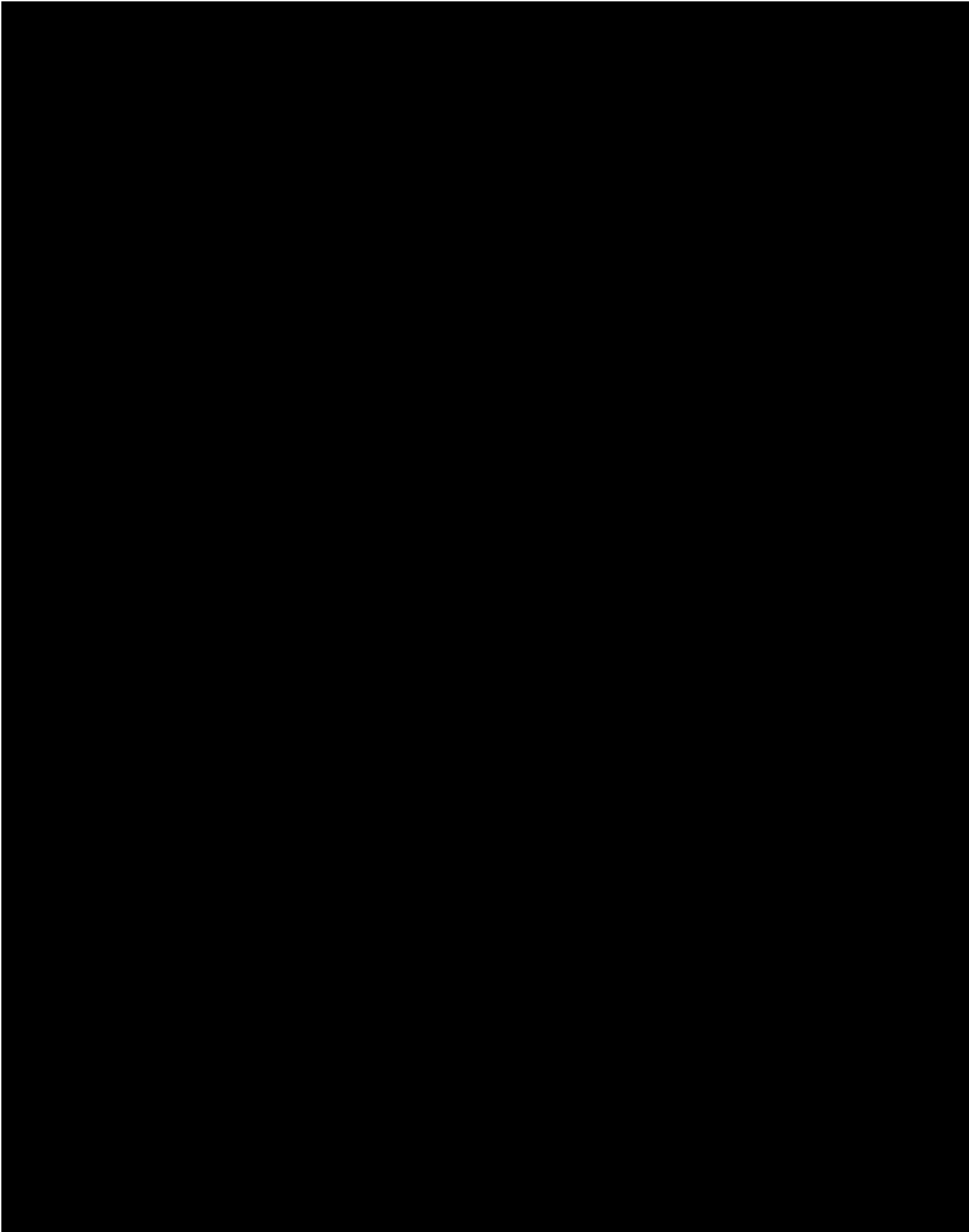
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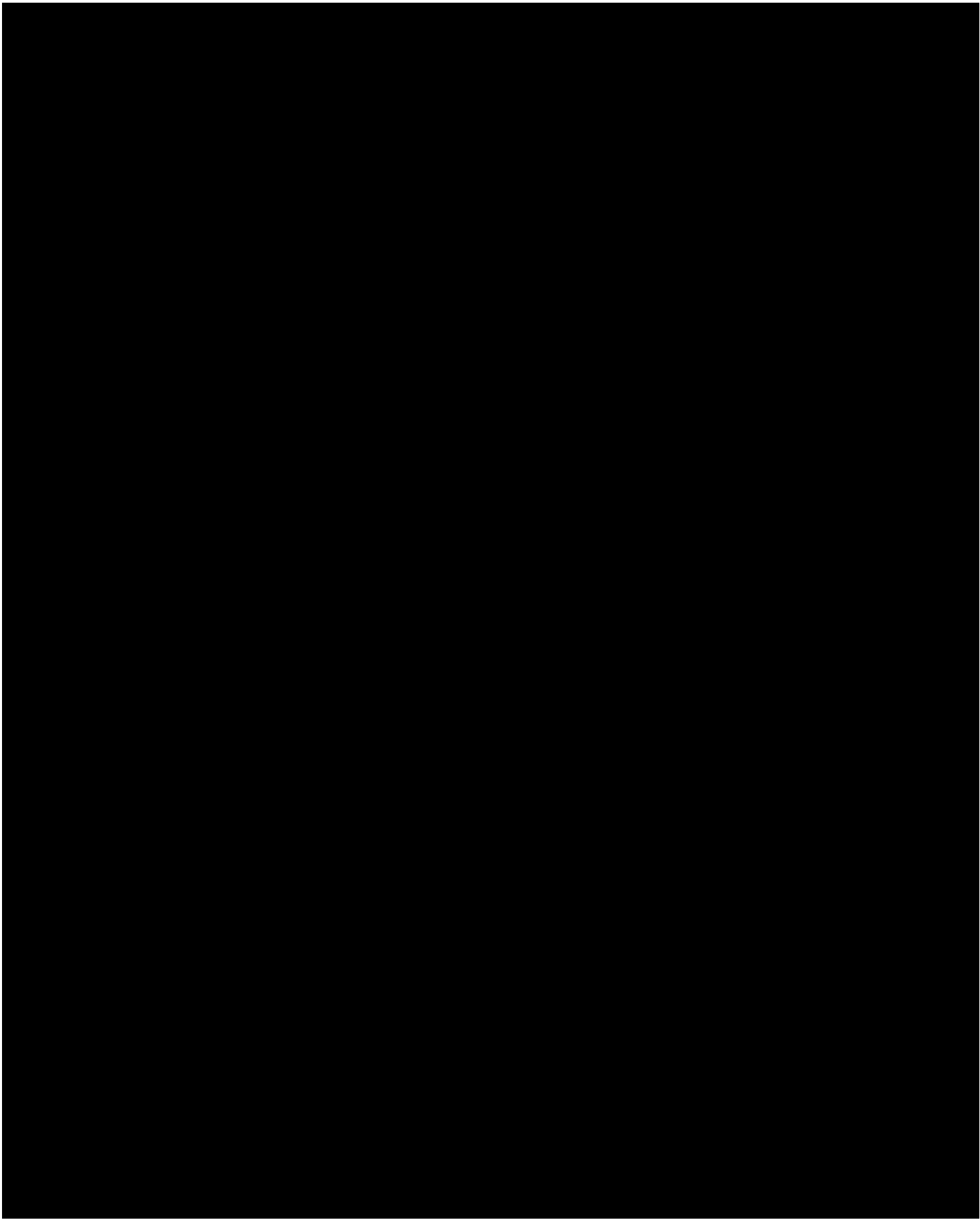


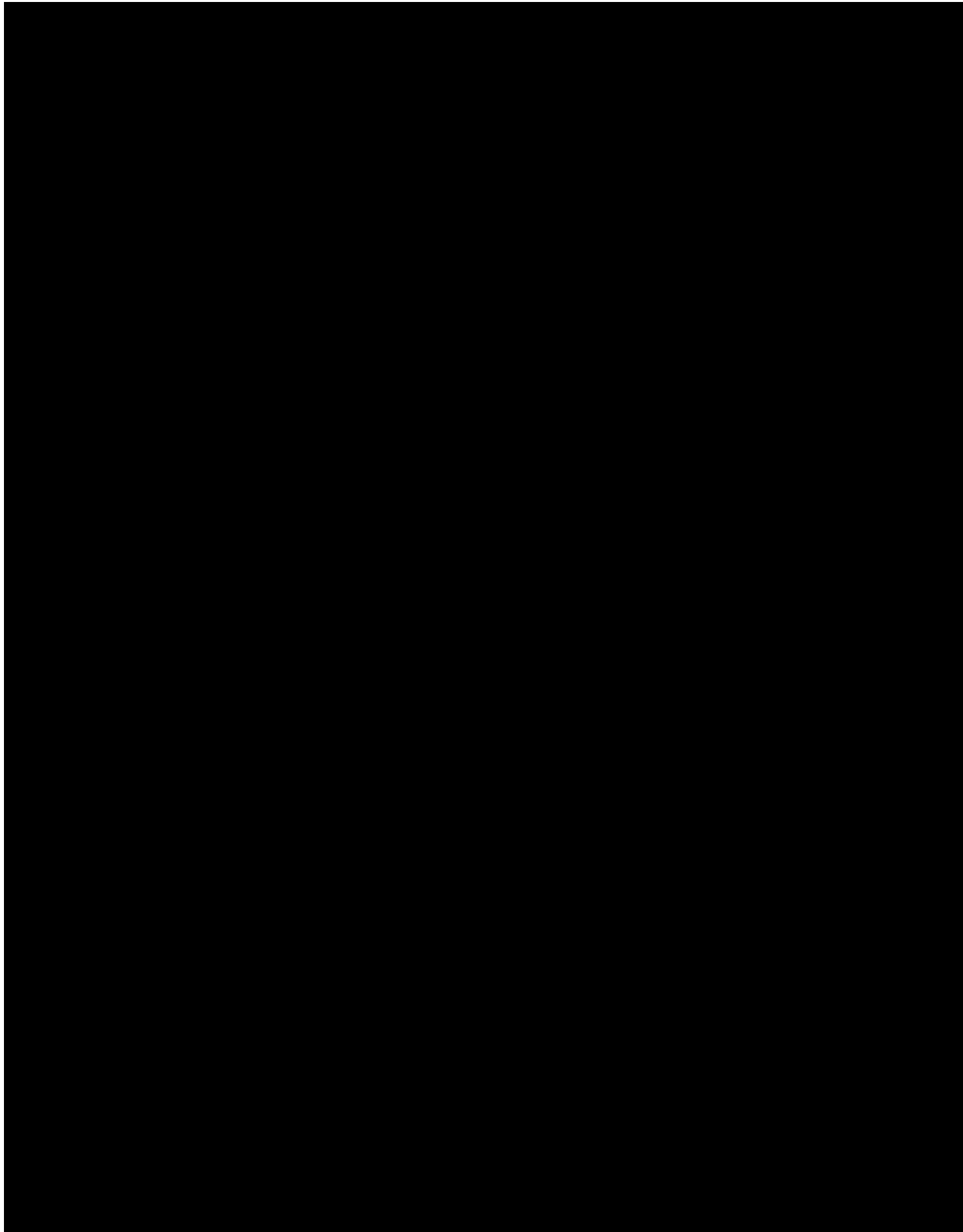
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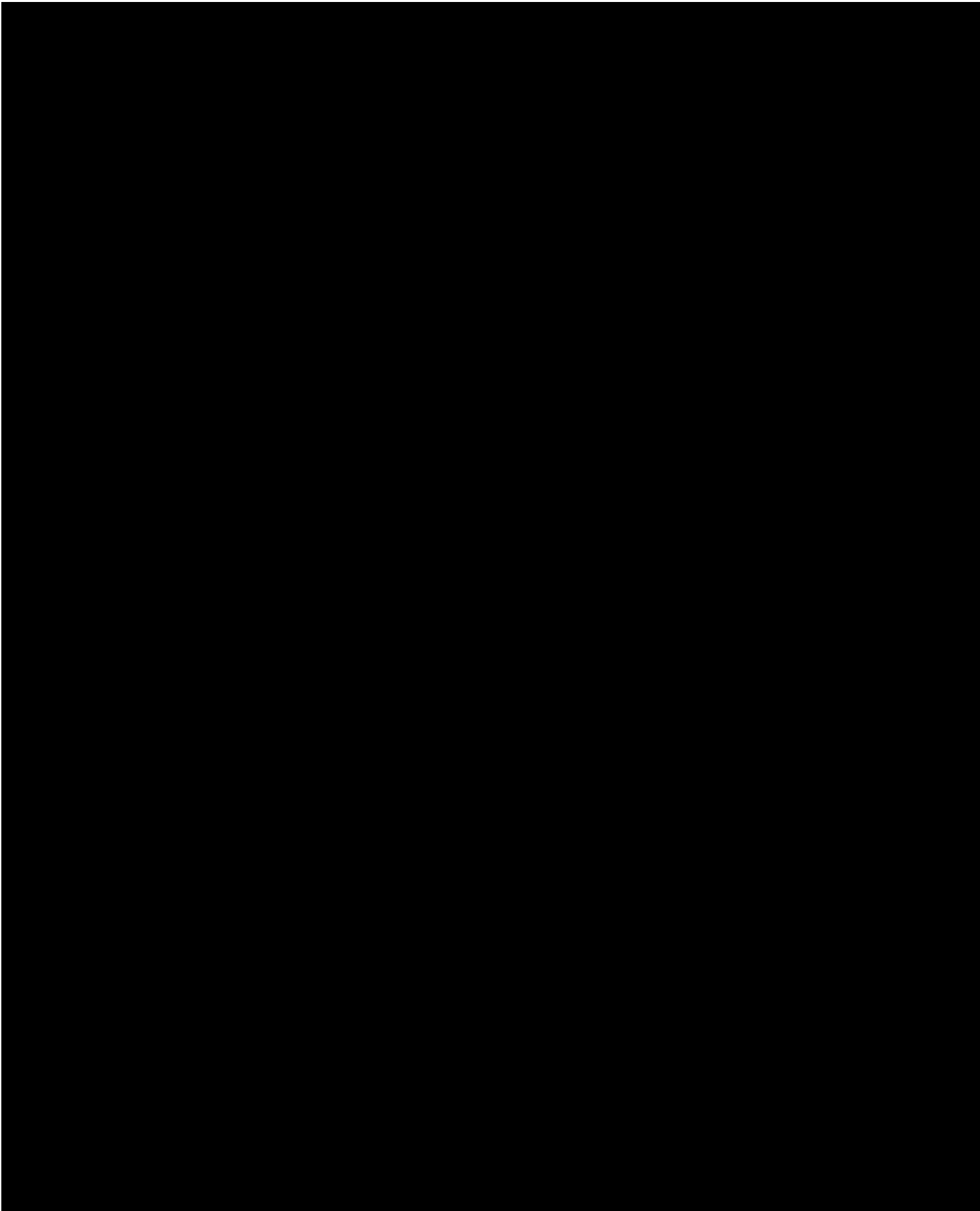


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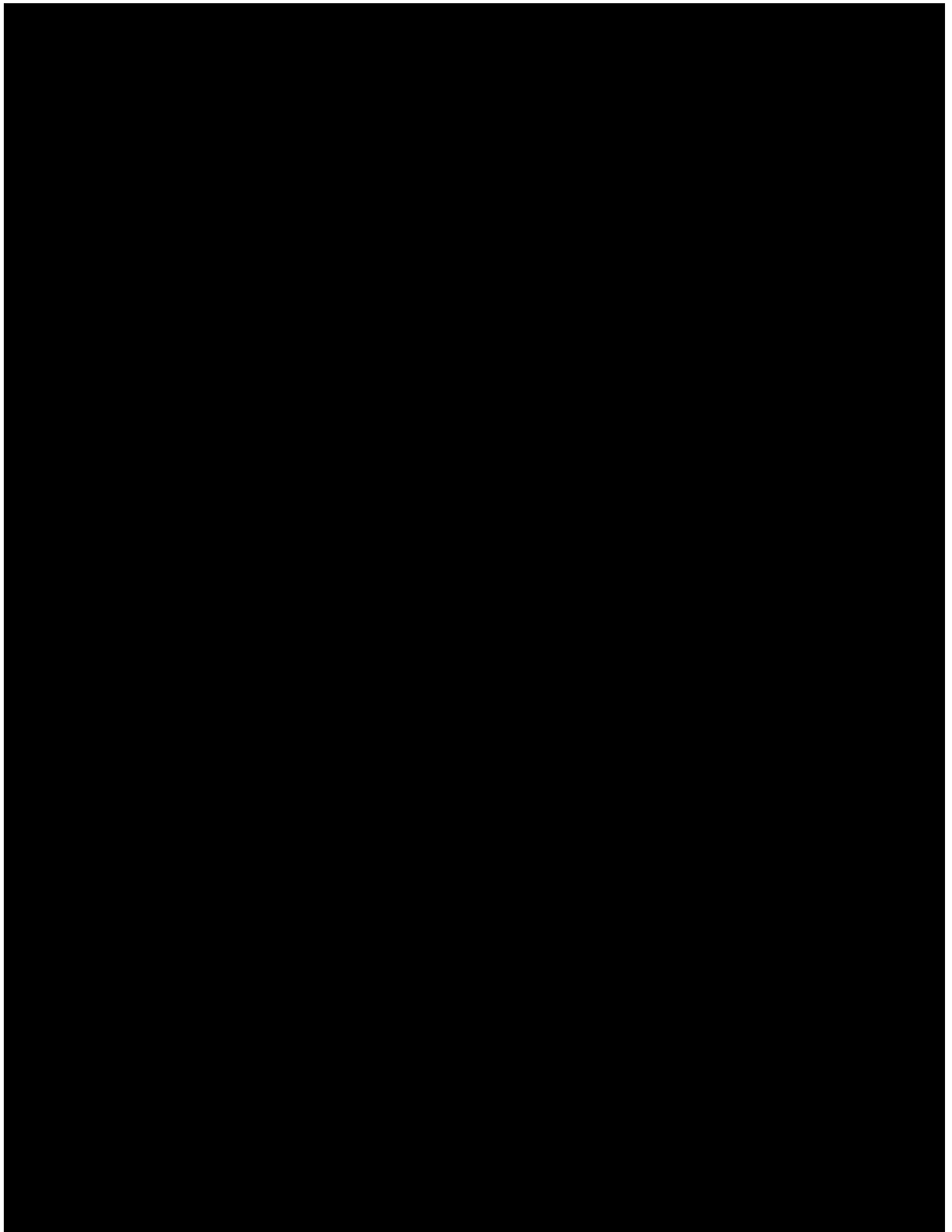


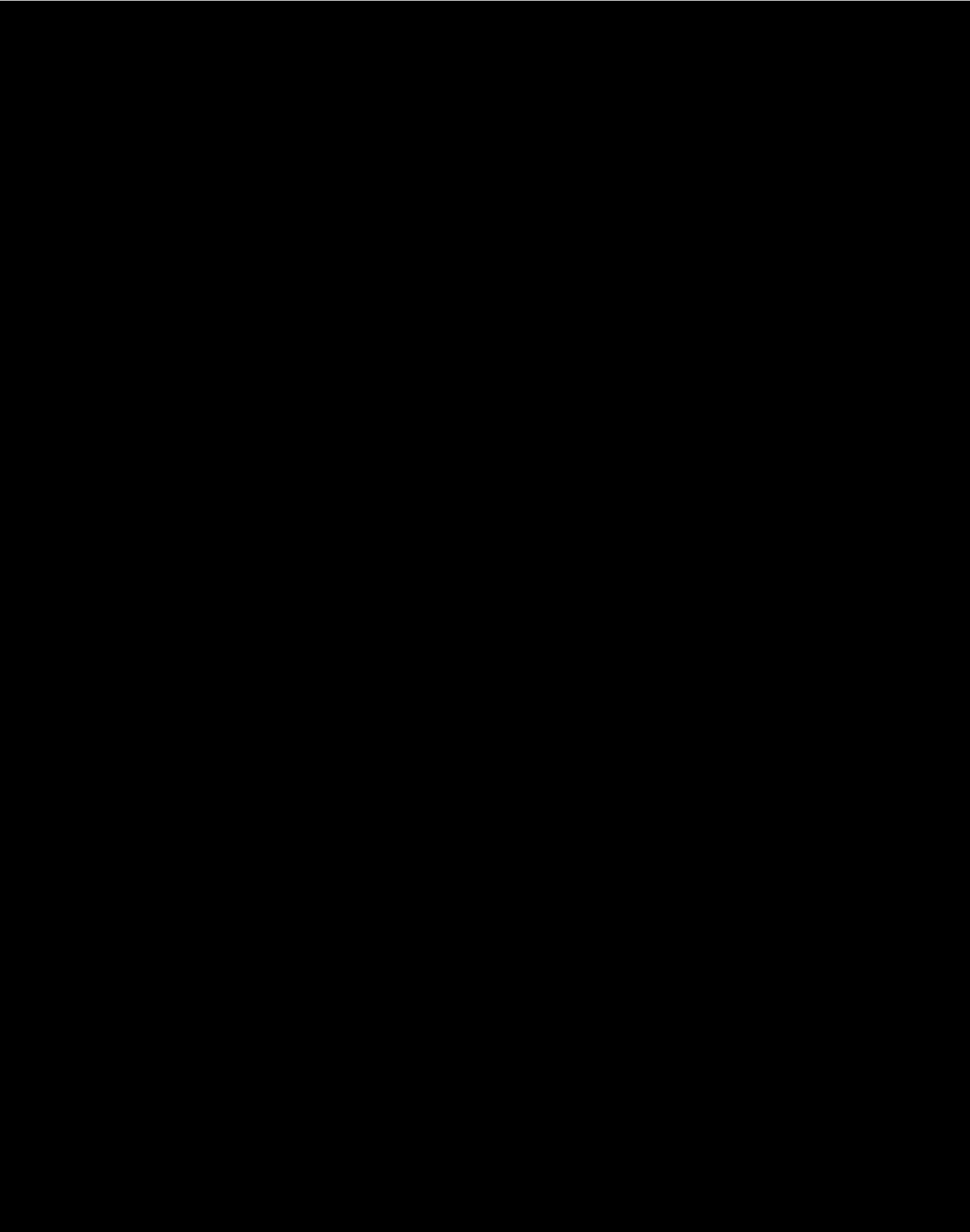


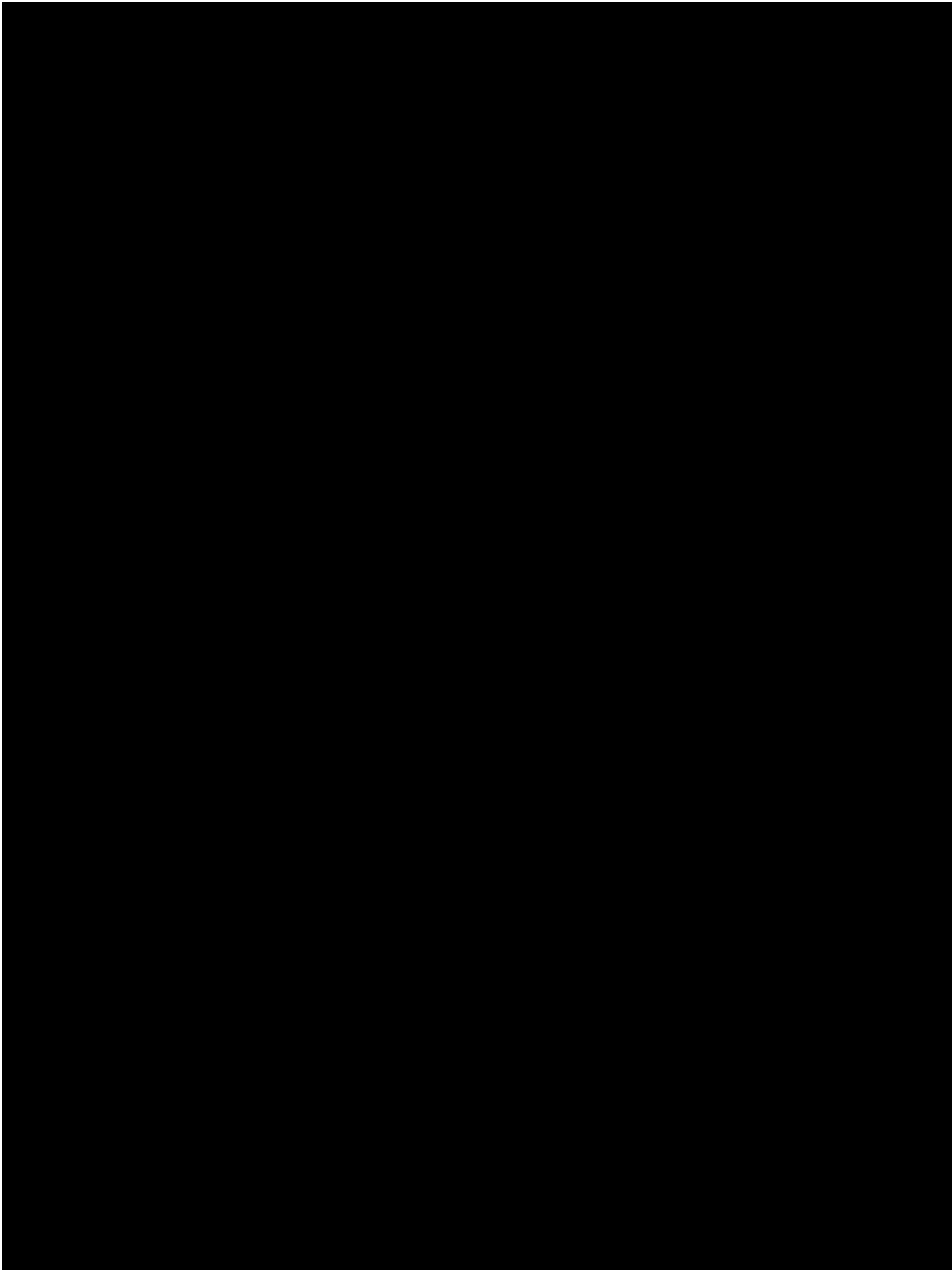
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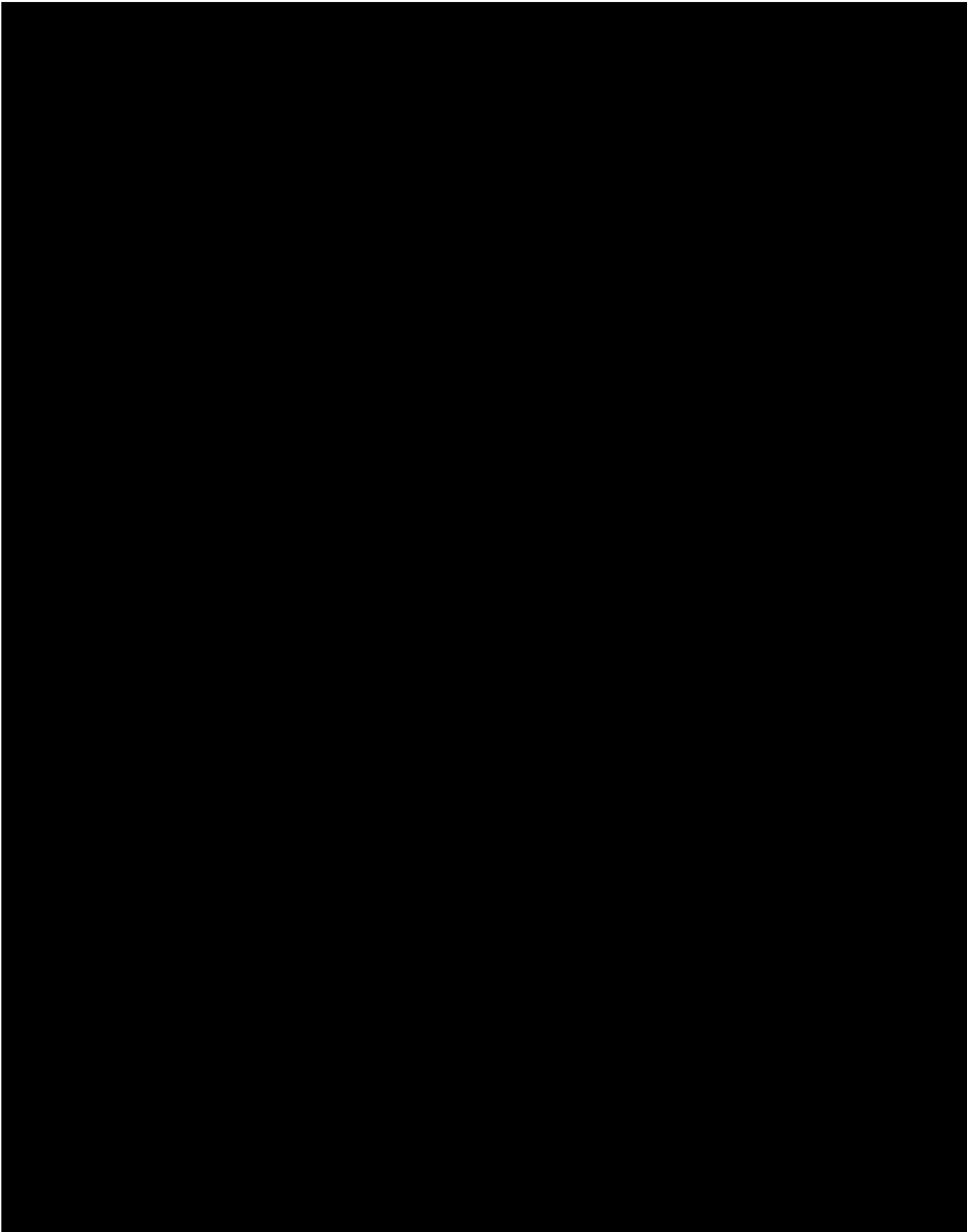


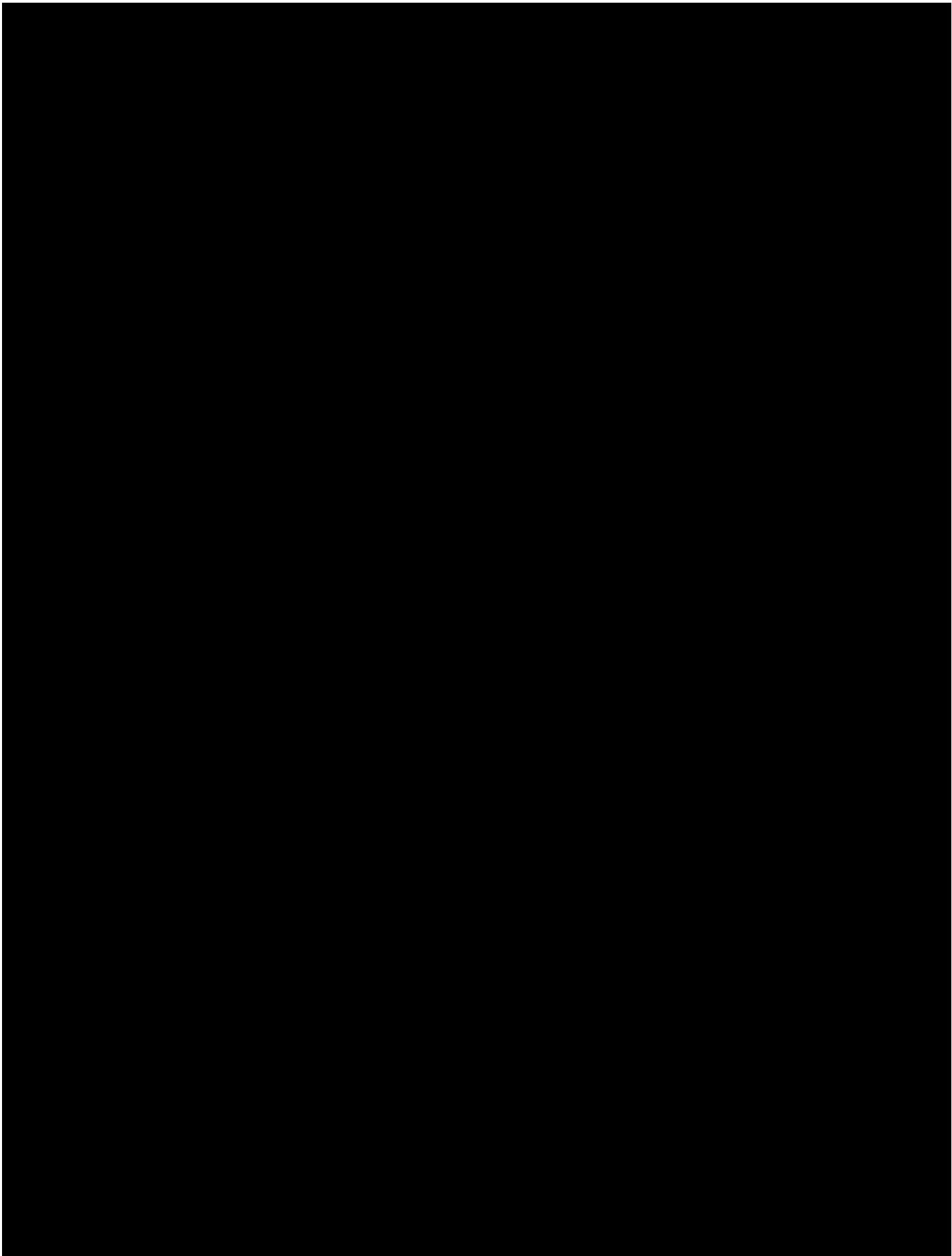
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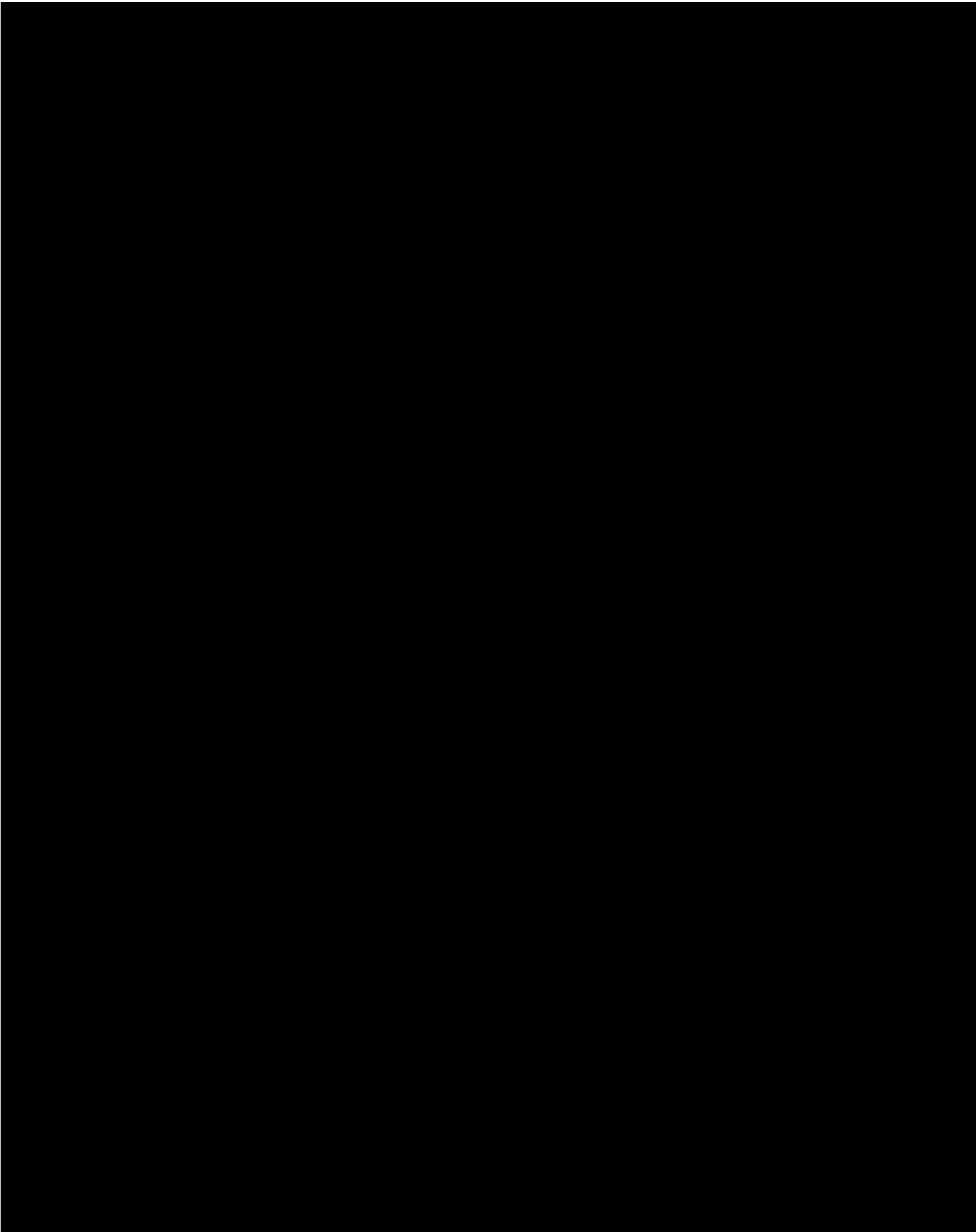


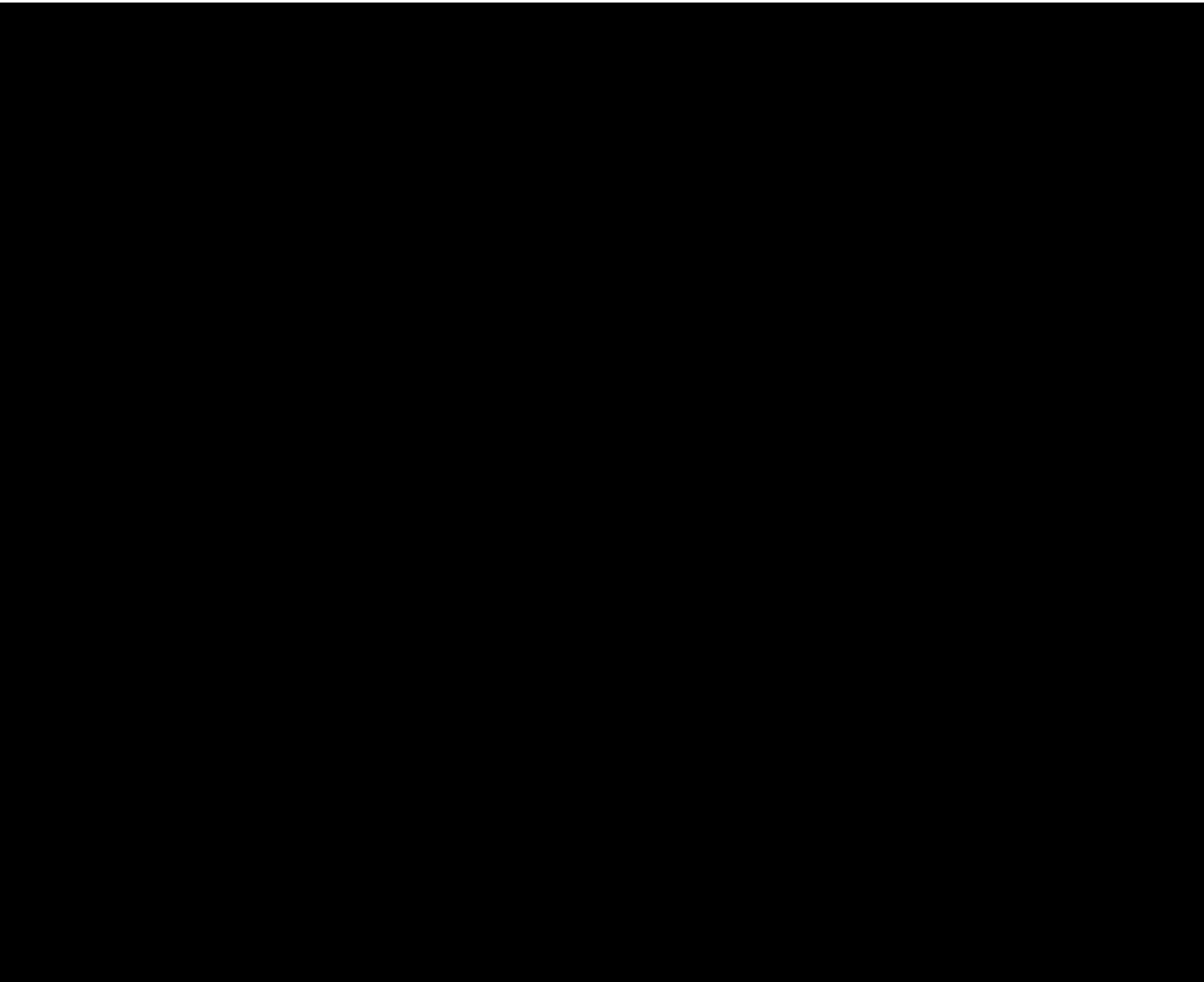






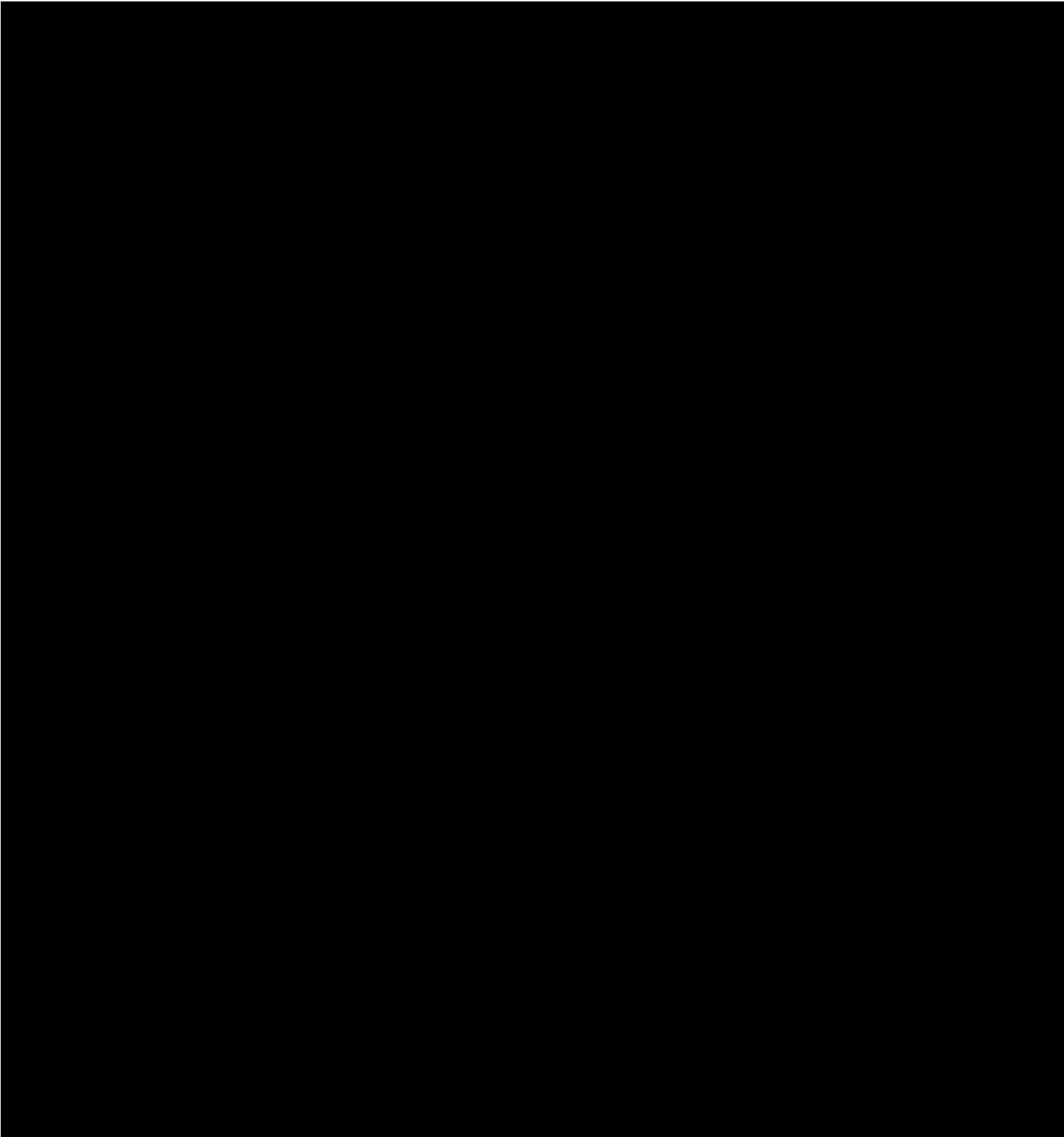


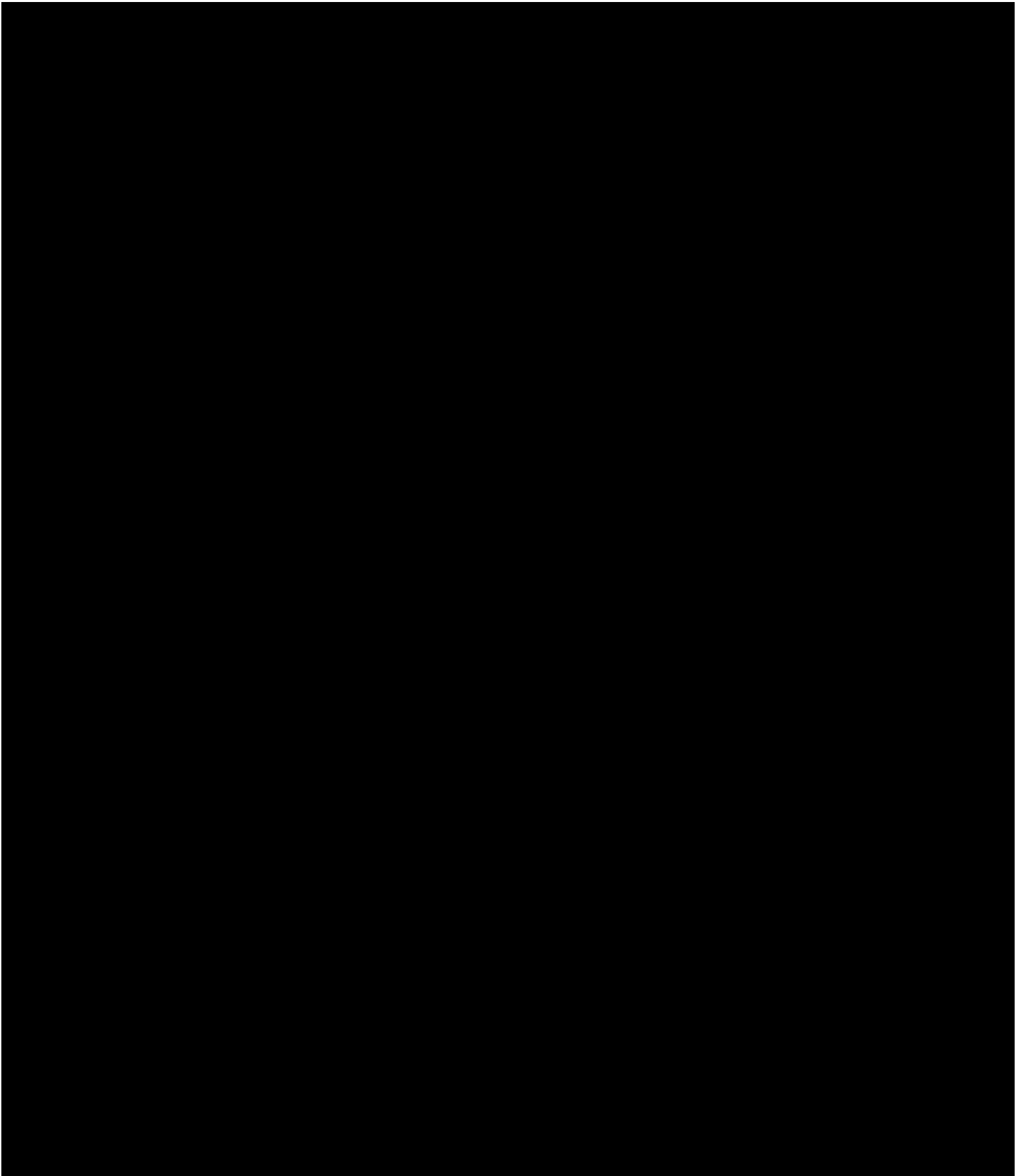


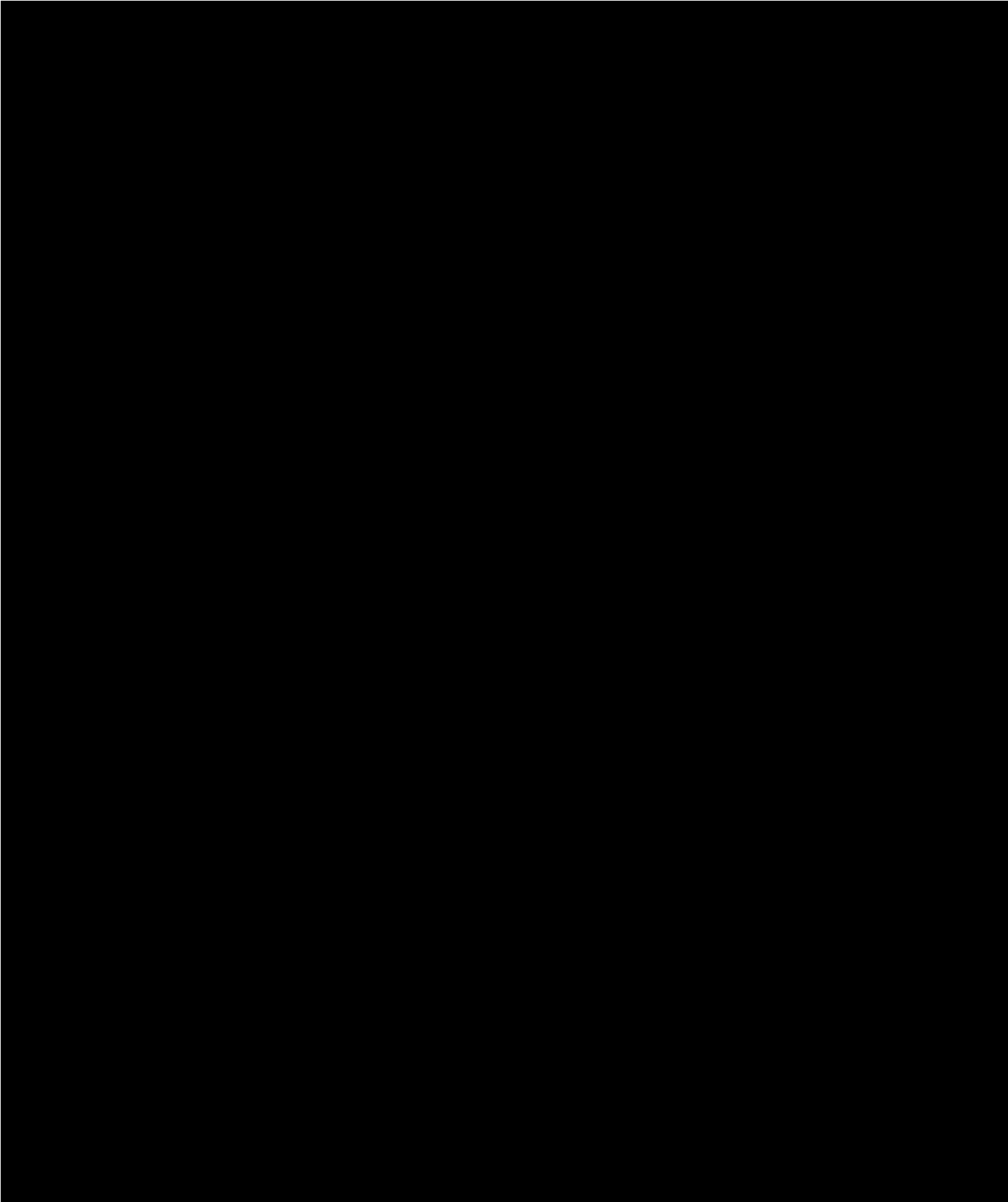


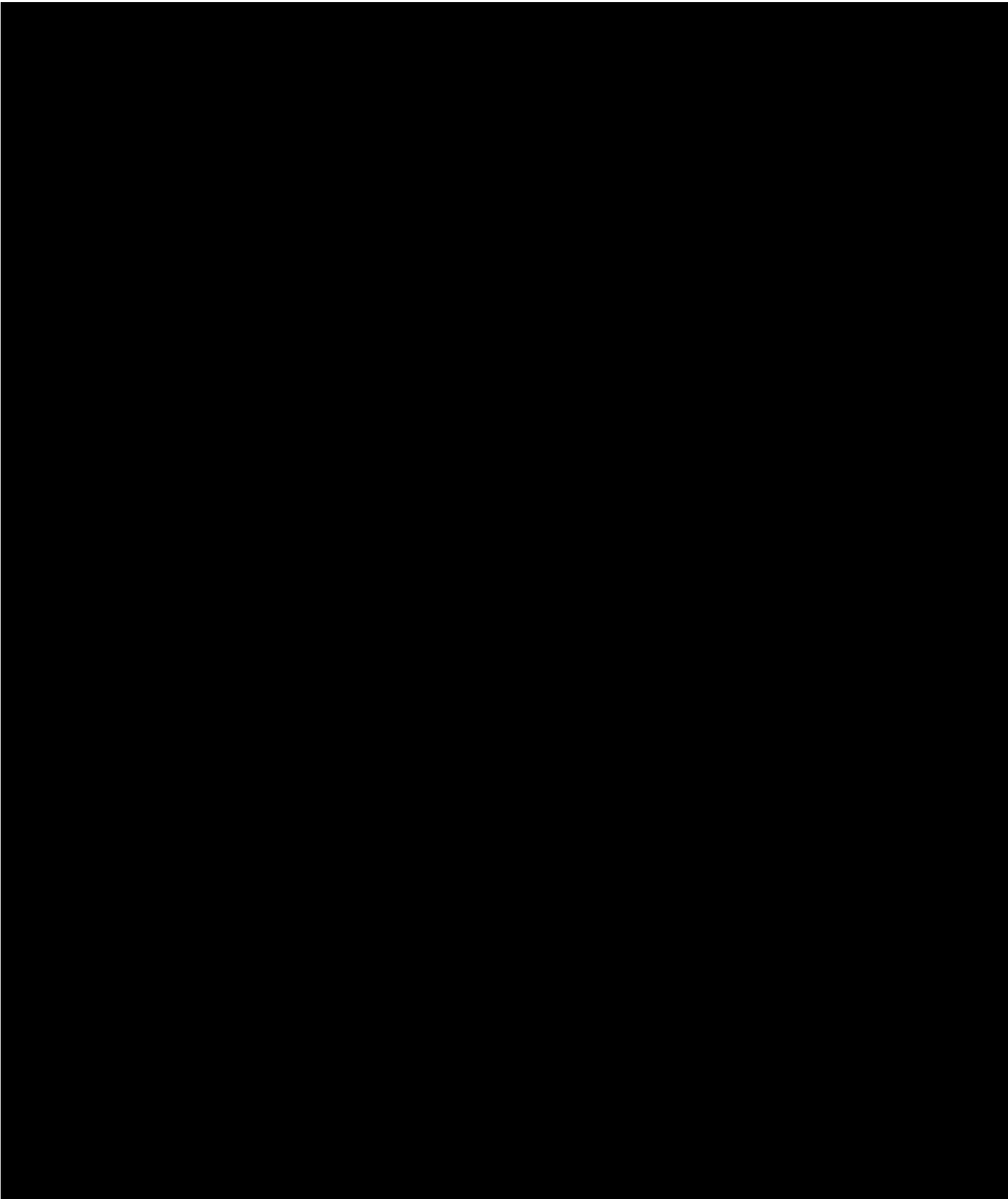
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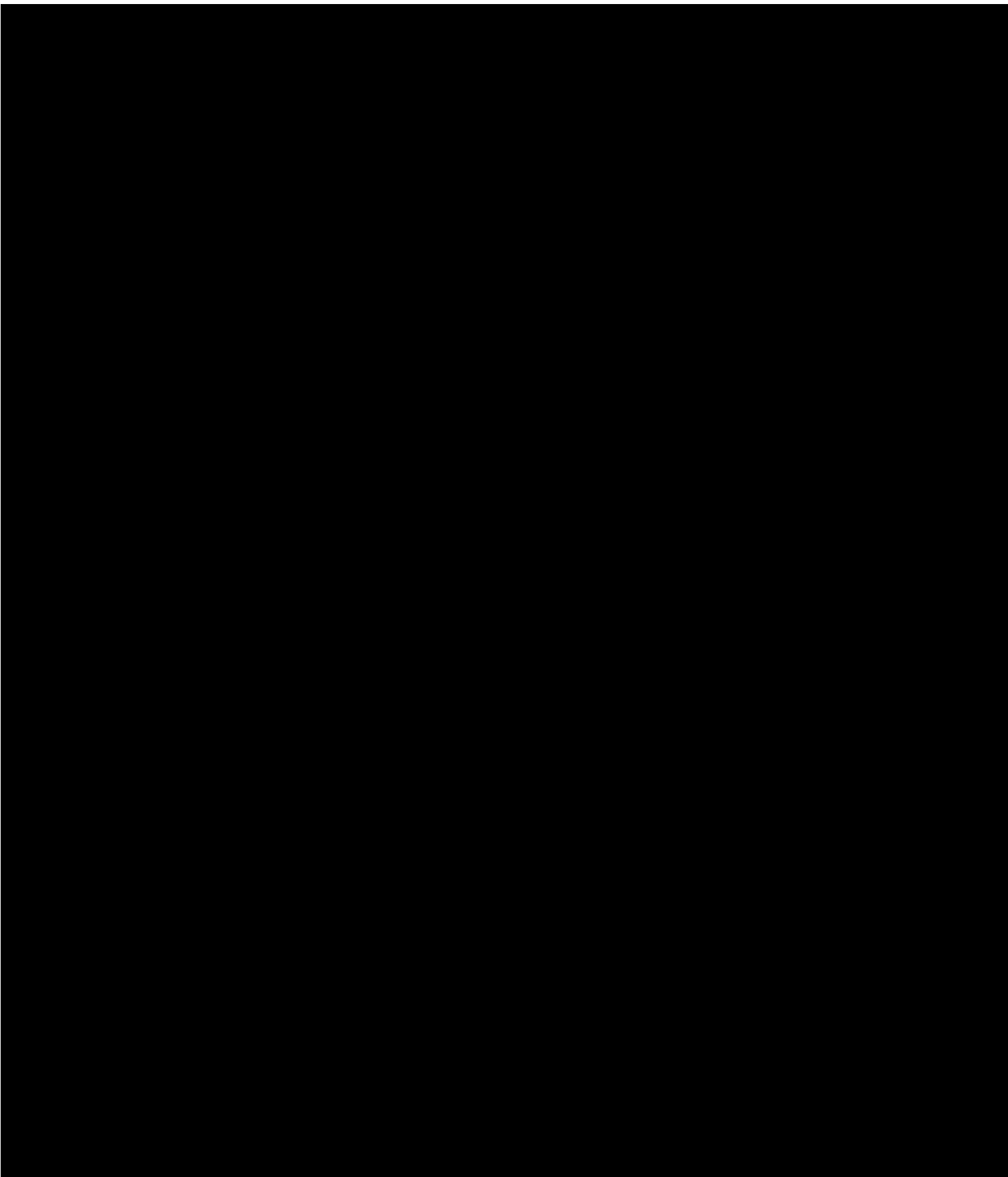
21. Sample AA GAMA License Agreement

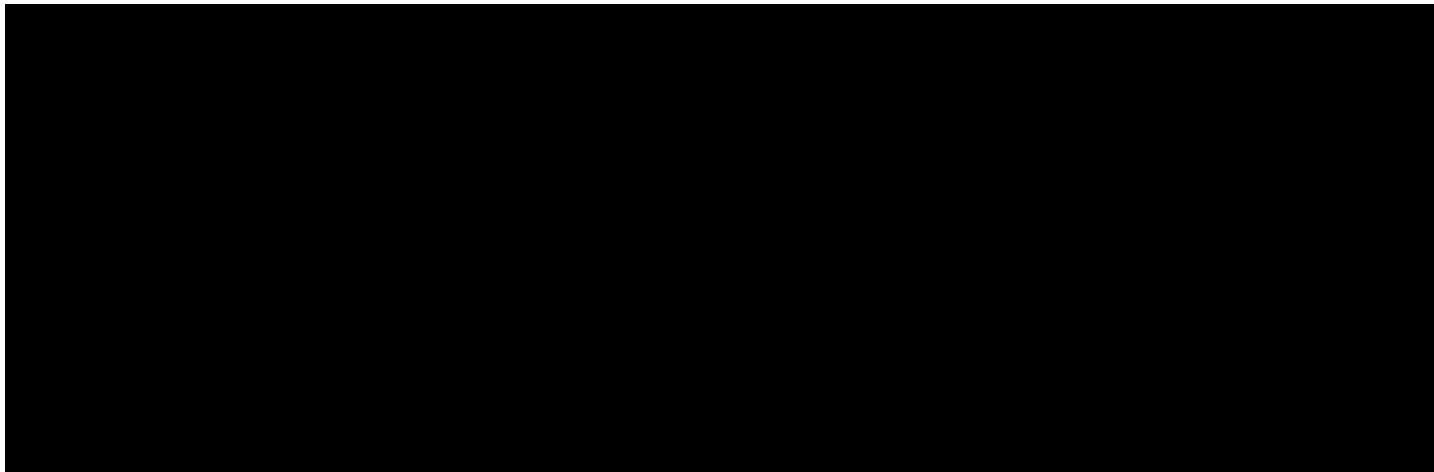




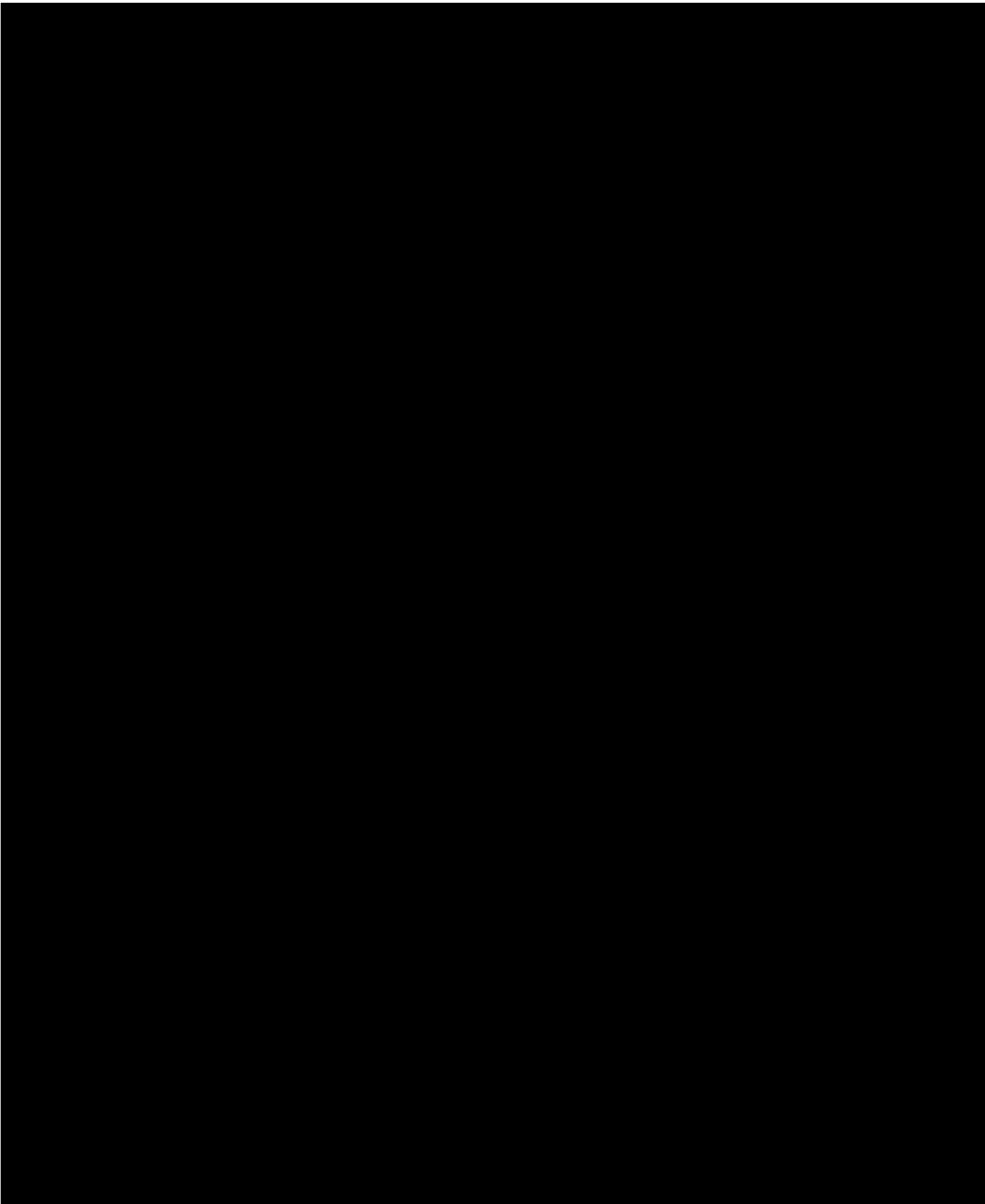


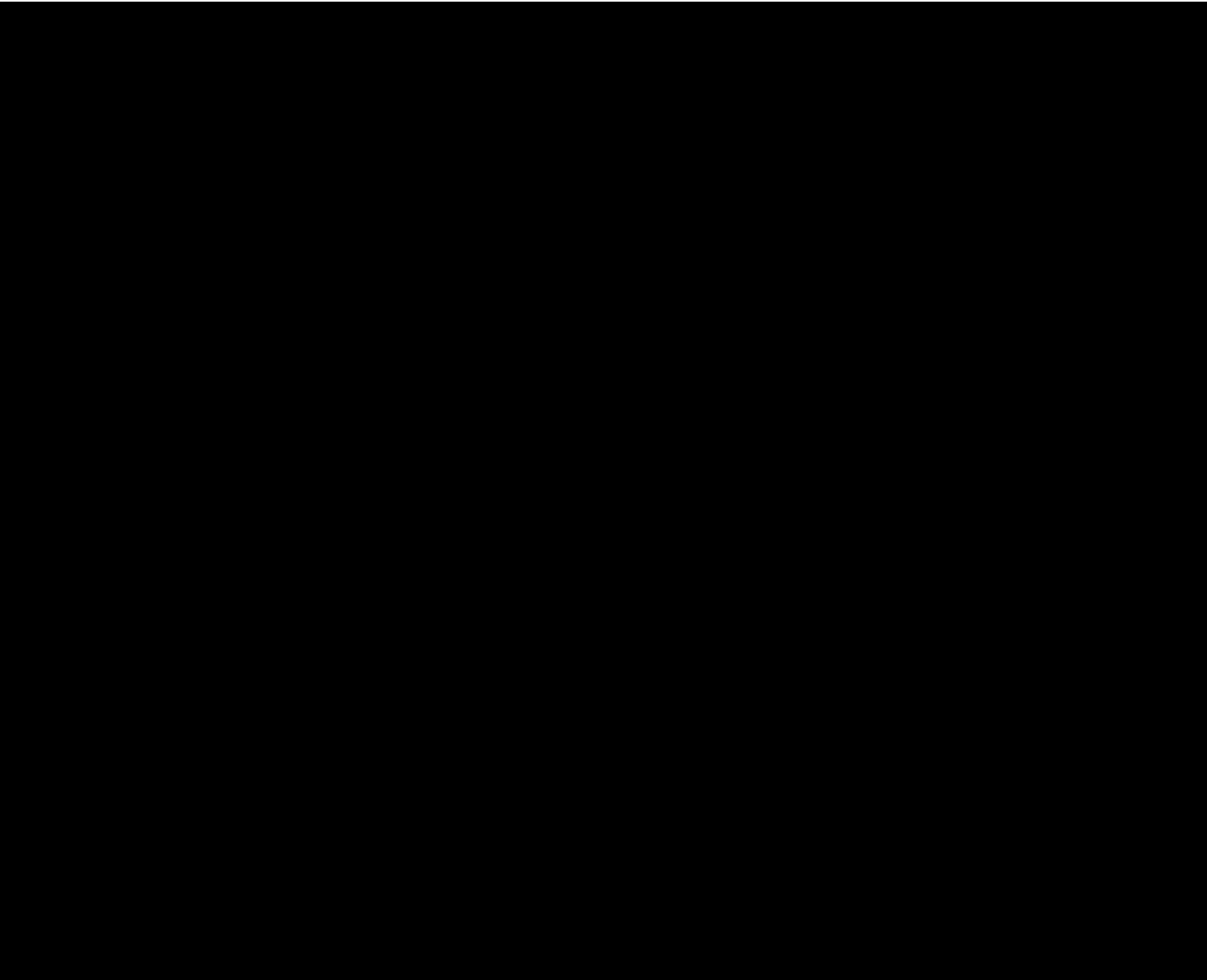




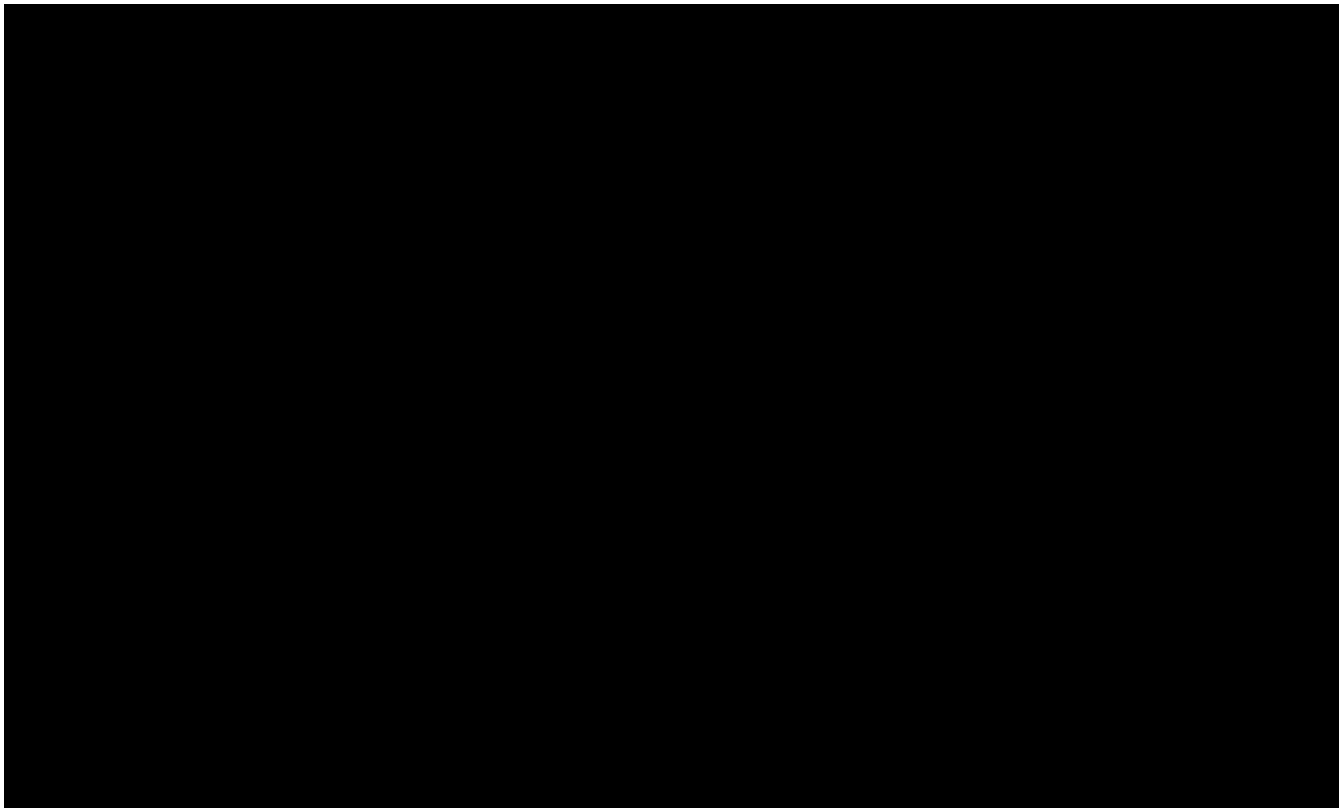


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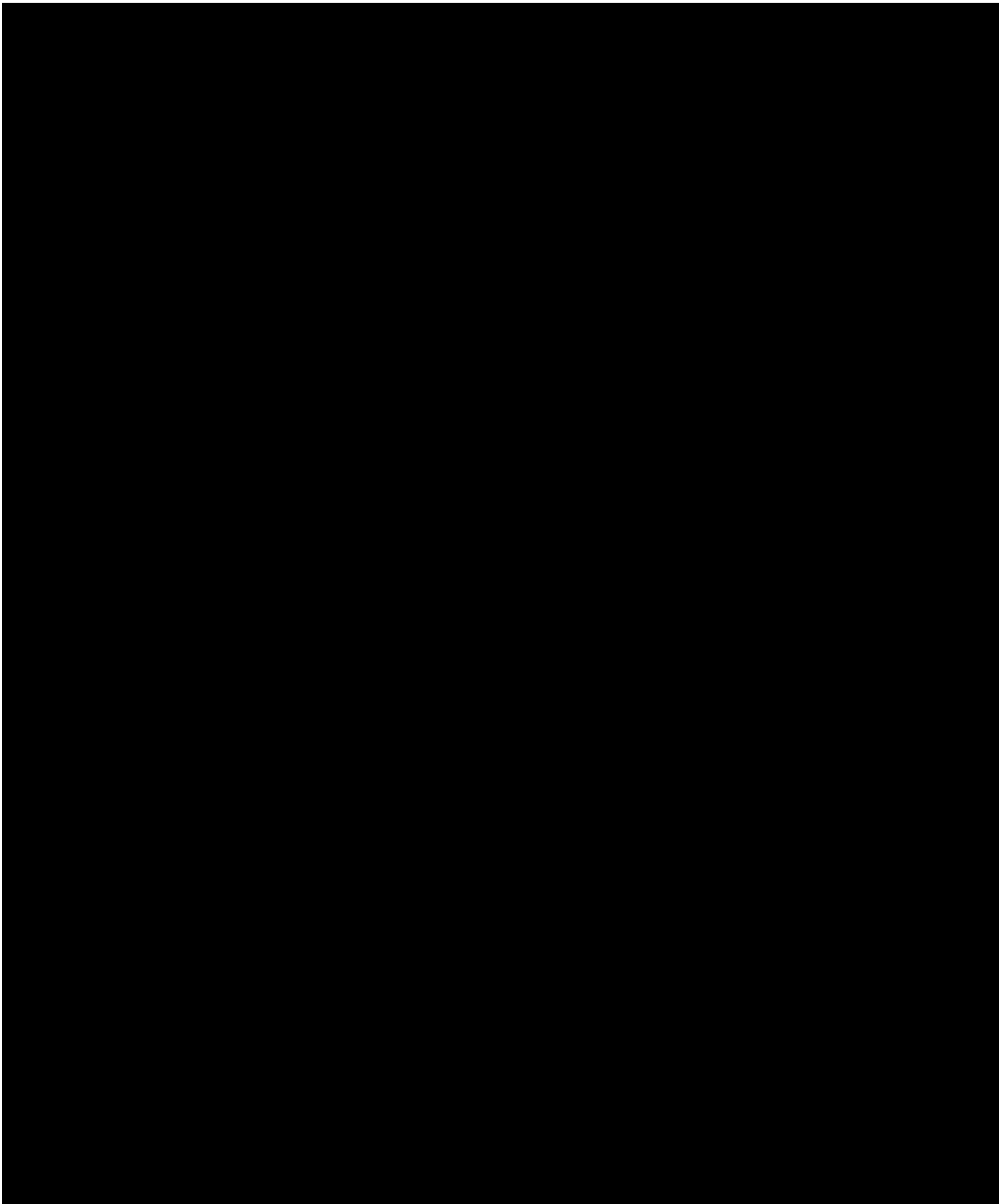
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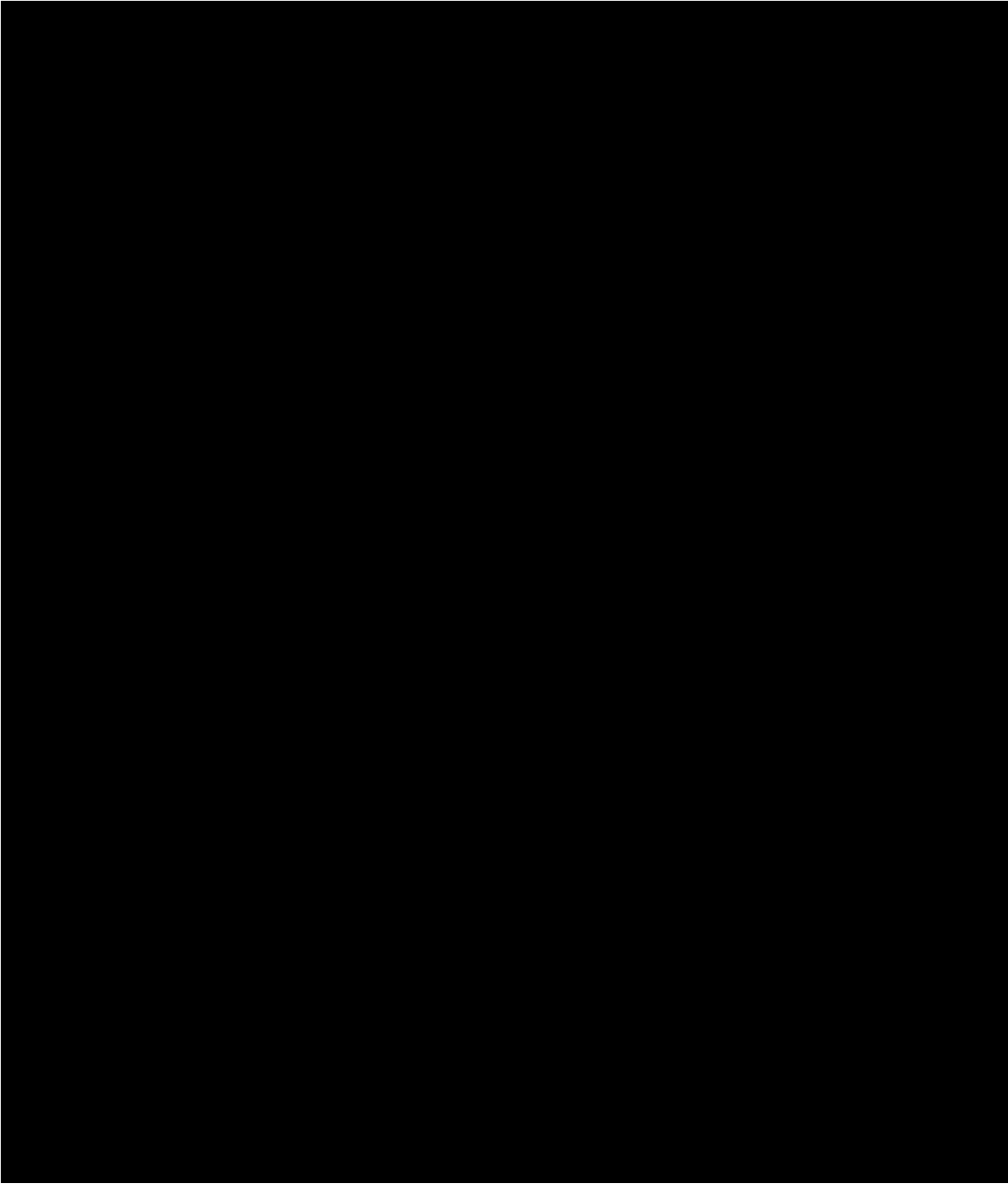


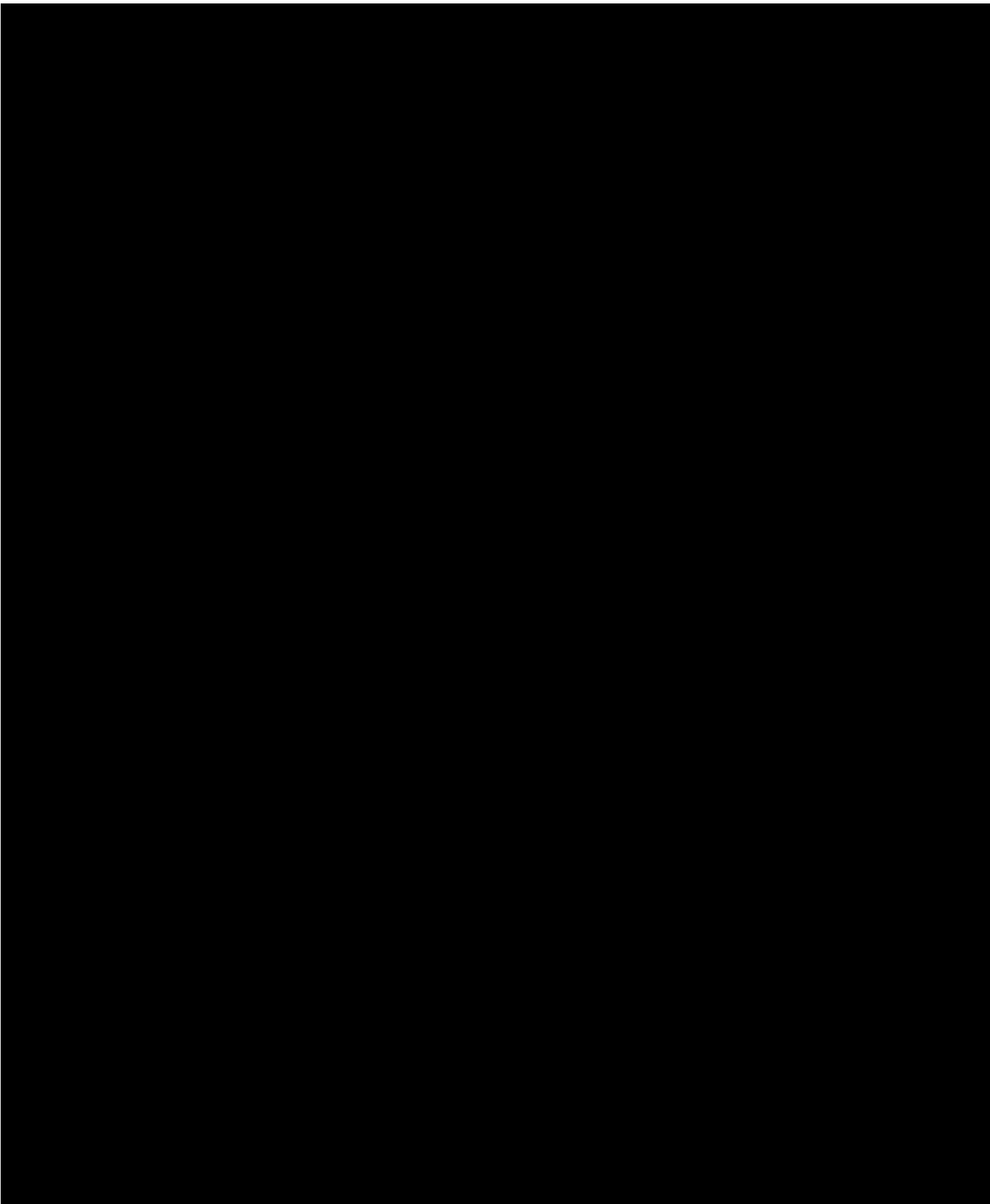
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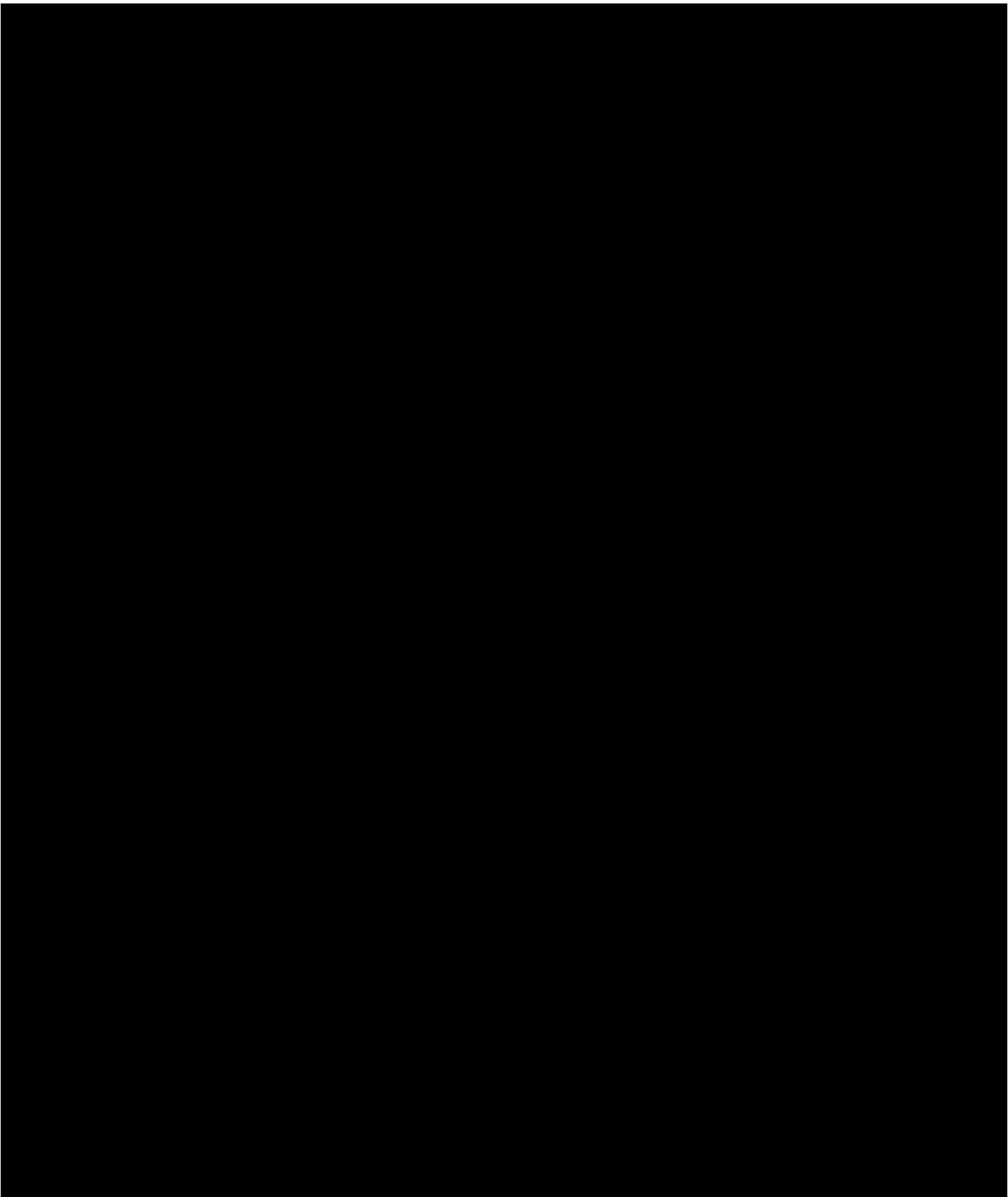


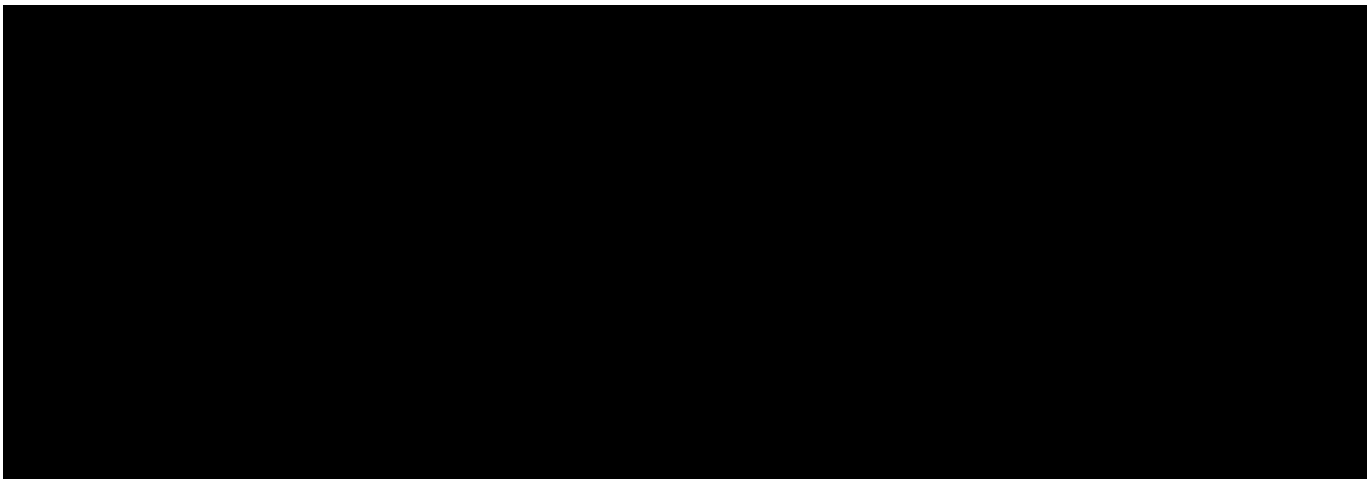
SAMPLE











SAMPLE

22. Texas Business Registration Receipt

TEXAS SECRETARY of STATE
JANE NELSON

Corporations Section
P.O.Box 13697
Austin, Texas 78711-3697



Jane Nelson
Secretary of State

Office of the Secretary of State

Transaction Receipt

Session ID: 060524QY3433
Document #: 1369677140002
June 5, 2024

Your document, or your order for copies or certificates, has been received through SOSDirect. For future reference, please make note of the document number above.

If you submitted a document, this receipt is not evidence that it has been approved for filing. All documents must be reviewed for statutory compliance.

You will be notified by email when your document is either filed or rejected, or when your order is ready.

- To track the progress of a document, visit the Business Filing Tracker at: <https://webservices.sos.state.tx.us/filing-status/status.aspx>
- To return to the SOSDirect Business Organizations menu, [click here](#).

Thank you for allowing us to assist you with your request. Whether you are filing a business or need assistance with another service, the Texas Secretary of State is here to serve you.



Office of the Secretary of State

June 06, 2024

Attn: InCorp Services, Inc.

InCorp Services, Inc.
9107 West Russell Road, Suite 100
Las Vegas, NV 89148 USA

RE: ESRI CANADA LIMITED
File Number: 805576530

It has been our pleasure to file the application for registration and issue the enclosed certificate of filing evidencing the authority of the foreign for-profit corporation to transact business in Texas.

Unless exempted, the foreign entity is subject to state tax laws, including franchise tax laws. Shortly, the Comptroller of Public Accounts will be contacting the entity at its registered office for information that will assist the Comptroller in setting up the franchise tax account for the foreign entity. Information about franchise tax, and contact information for the Comptroller's office, is available on their web site at <https://window.state.tx.us/taxinfo/franchise/index.html>.

The registered foreign entity is not required to file annual reports with the Secretary of State. An application for amended registration must be filed with the Secretary of State if the foreign entity changes its name, changes the purposes to be pursued in Texas, or changes the assumed name it elected to use on its application for registration. It is important for the foreign entity to continuously maintain a registered agent and office in Texas. Failure to maintain an agent or office or file a change to the information in Texas may result in the revocation of the entity's registration by the Secretary of State.

If we can be of further service at any time, please let us know.

Sincerely,

Corporations Section
Business & Public Filings Division
(512) 463-5555

Enclosure



Office of the Secretary of State

CERTIFICATE OF FILING OF

ESRI CANADA LIMITED
File Number: 805576530

The undersigned, as Secretary of State of Texas, hereby certifies that an Application for Registration for the above named Foreign For-Profit Corporation to transact business in this State has been received in this office and has been found to conform to the applicable provisions of law.

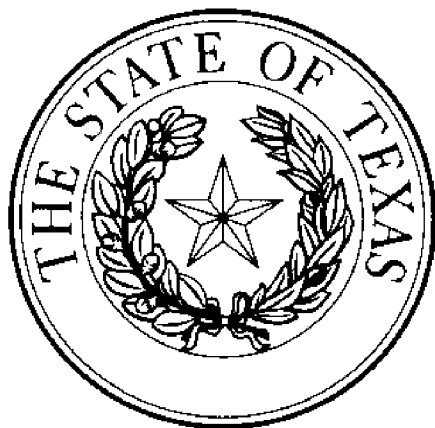
ACCORDINGLY, the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law, hereby issues this certificate evidencing the authority of the entity to transact business in this State from and after the effective date shown below for the purpose or purposes set forth in the application under the name of

ESRI CANADA LIMITED

The issuance of this certificate does not authorize the use of a name in this state in violation of the rights of another under the federal Trademark Act of 1946, the Texas trademark law, the Assumed Business or Professional Name Act, or the common law.

Dated: 06/05/2024

Effective: 06/05/2024



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

Jane Nelson
Secretary of State

Form 301

Secretary of State
P.O. Box 13697
Austin, TX 78711-3697
FAX: 512/463-5709

Filing Fee: \$750



**Application for
Registration of a
Foreign For-Profit
Corporation**

**Filed in the Office of the
Secretary of State of Texas
Filing #: 805576530 06/05/2024
Document #: 1369677140002
Image Generated Electronically
for Web Filing**

1. The entity is a foreign for-profit corporation. The name of the entity is :

ESRI CANADA LIMITED

2A. The name of the corporation in its jurisdiction of formation does not contain the word "corporation," "company," "incorporated," or "limited" (or an abbreviation thereof). The name of the corporation with the word or abbreviation which it elects to add for use in Texas is:

2B. If the corporate name is not available in Texas, then set forth the name under which the corporation will qualify and transact business in Texas:

3. Its federal employer identification number is:

Federal employer identification number is not available at this time.

4. It is incorporated under the laws of: **ONTARIO, CANADA** and the date of its formation in that jurisdiction is: **12/27/1984**

5. As of the date of filing, the undersigned certifies that the foreign corporation currently exists as a valid corporation under the laws of the jurisdiction of its formation.

6. The purpose or purposes of the corporation that it proposes to pursue in the transaction of business in Texas are set forth below. The entity also certifies that it is authorized to pursue such stated purpose or purposes in the state or country under which it is organized.

To sell software and software related services

7. The date on which the foreign entity intends to transact business in Texas, or the date on which the foreign entity first transacted business in Texas is: **07/01/2024**

8. The principal office address of the corporation is:

12 Concorde Place, Suite 900, Toronto, ON, CAN M3C 3

9A. The initial registered agent is an organization by the name of:

InCorp Services, Inc.

9B. The initial registered agent is an individual resident of the state whose name is:

9C. The business address of the registered agent and the registered office address is:

**815 Brazos St
Ste 500 Austin TX 78701**

Consent of Registered Agent

A. A copy of the consent of registered agent is attached.

OR

B. The consent of the registered agent is maintained by the entity.

10. The corporation hereby appoints the Secretary of State of Texas as its agent for service of process under the circumstances set forth in section 5.251 of the Texas Business Organizations Code.

11. The name and address of each person on the board of directors is:

Director 1:	[REDACTED]
Address:	380 New York Street Redlands CA, USA 92373
Director 2:	[REDACTED]
Address:	297 Glen Road Toronto ON, CAN M4W 2X4

Supplemental Provisions / Information

[The attached addendum, if any, is incorporated herein by reference.]

Effectiveness of Filing

A. This document becomes effective when the document is filed by the secretary of state.

OR

B. This document becomes effective at a later date, which is not more than ninety (90) days from the date of its signing. The delayed effective date is:

Execution

The undersigned affirms that the person designated as registered agent has consented to the appointment. The undersigned signs this document subject to the penalties imposed by law for the submission of a materially false or fraudulent instrument and certifies under penalty of perjury that the undersigned is authorized under the provisions of law governing the entity to execute the filing instrument.

Date: **June 5, 2024**

[REDACTED]

Signature and title of authorized person on behalf of the foreign entity

FILING OFFICE COPY