



TOWN OF GREENFIELD
Purchasing Department

Request for Proposals

17-08

PROPERTY TAX ASSESSMENT SERVICES

February 2017

DATE OF ISSUANCE:

February 6, 2017 at 10:00 a.m.

BID DUE DATE:

March 3, 2017 at 11:00 a.m.

SUBMIT TO:

PURCHASING DEPARTMENT
MAYOR'S OFFICE
TOWN OF GREENFIELD
14 COURT SQUARE
GREENFIELD, MA 01301

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Advertisement for Bidders

**Town of Greenfield
Office of the Mayor
14 Court Square
Greenfield, MA 01301**

The Town of Greenfield is seeking proposals from qualified firms to provide the Town with property tax assessment services for fiscal years 2018-2020. Services include but are not limited to data listing, mapping, inspections, and consulting. Greenfield is a Town of approximately 17,500 residents located in Western Massachusetts. It currently has 7,000 parcels with a taxable value of approximately \$1.4 billion.

A Request for Proposals (RFP) is being solicited instead of a bid in order allow the Town to evaluate multiple options and determine the proposal and financial arrangement that best meets the Town's interest.

As of 10:00 a.m. on February 6, 2017 copies of this RFP for Property Tax Assessment Services may be obtained from the Town of Greenfield website at www.Greenfield-ma.gov under "Departments", "Purchasing", "Active Bids/RFQ/RFP" or from the Purchasing Department at purchasing@greenfield-ma.gov . Call A. LaBonté at (413) 772-1560 x-6136 for additional information.

Sealed Proposals addressed to the Office of the Mayor, 14 Court Square, Greenfield, MA. 01301 and endorsed "RFP # 17-08 Property Tax Assessment Services" will be accepted until 11:00 a.m. on March 3, 2017.

Contract documents and proposal forms will be available as of February 6, 2017 and will be emailed upon request by contacting purchasing@greenfield-ma.gov.

Lane Kelly
Procurement Officer
Town of Greenfield
14 Court Square
Greenfield, MA 01301
1-413-772-1567 ext. 6172

Request for Proposals For Property Assessment Services

Section I- Overview

The Town of Greenfield is seeking proposals from qualified firms to provide the Town with property tax assessment services. Greenfield is a town of approximately 17,500 residents located in Western Massachusetts. It currently has 7,000 parcels with a taxable value of approximately \$1.4 billion. These figures are broken down as to classification in Addendum F at the end of the document.

Due to the technical nature of the services required under the proposed contract, the Town has determined that this procurement is best served by using the RFP process under Massachusetts General Laws, Chapter 30B, § 6. Such a process will enable the Town to evaluate the experience of the contractor and his or her ability to carry out the Town's mandate of fair and equitable taxation under the direction of the Board of Assessors. Because property tax assessment is an important component of the Town's overall financial management, it is important that the Town have the ability to select the most advantageous proposal on the basis of both cost and technical expertise

NOTICE TO BIDDERS

Copies of this RFP for Greenfield- Property Tax Assessment Services may be obtained from the Town of Greenfield website at www.Greenfield-ma.gov under "Departments", "Purchasing", and "Active Bids/RFQ/RFP".

The Town reserves the right to accept or reject any or all proposals and to waive any irregularities. The Town also reserves the right to negotiate with selected firms regarding price and fee structures. All information included in a proposal may be incorporated, at the sole discretion of the Town, into the contract to be entered into between the Town and the successful bidder.

E. Solicitation Process

This RFP is being solicited under a multi-step procurement procedure consisting of two phases and in compliance with Chapter 30B of the Massachusetts General Laws. The first step requires all proponents to submit technical proposals addressing those items cited in Section III of this RFP. An Evaluation Team will evaluate and rank the proposals based on the evaluation criteria outlined in Section IV - Evaluation Criteria. A short list of proponents will be selected for further evaluation. Only those firms that are placed on the short list on the basis of the evaluation criteria will be considered during the second phase. During the second phase, interviews *may* be held if the Evaluation Team feels it is in the Town's best interest to do so.

In the final phase, negotiations will be held with the proponent(s) ranked the highest by the Evaluation Team on the basis of the proposal and possible interview. Based on these negotiations a contract will be written. The contract must be approved by the Mayor. After such approvals and signatures by appropriate parties implementation may begin.

G. Conditions of Award

It is the intent of the Town to award the project to the most responsive proponent provided the proposal has been submitted in accordance with the requirements of this Request for Proposals document. The Committee shall be the sole judge of the firm's qualifications and whether the proposal is in the best interests of the Town.

The Town may conduct such investigations as it considers necessary to assist in the evaluation of any proposal and to establish the responsibility, qualifications and financial ability of the offers and award in accordance with the RFP documents to the Town's satisfaction within the prescribed time. The Town may consider, but not be limited to, the performance date and guarantees of materials and equipment as part of its evaluation. After approval by the selection committee, notice of the award will be posted on the Town of Greenfield website.

Up to the time of signature of contract, the Town shall have the right in its sole discretion to terminate negotiations with or without cause if it deems in its best interest to do so.

H. Amendments to this Request for Proposal

The Town may revise this RFP by issuing written addenda. Addenda will be posted on the Town's website and e-mailed to all *known* bidders. Interested persons or entities are advised to identify their interest to the Purchasing Department to ensure they receive any and all addenda issued to the original proposal.

I. Additional Information

Proposals will be considered only from proponents who are financially responsible and who have the resources and ability to successfully complete and operate the project. The Town reserves the right to be the sole judge of these criteria.

The Town may request additional information as deemed necessary. Failure to provide such information may result in the proposal being considered incomplete.

The Town reserves the right to reject any and all proposals in whole or in part; to waive any technicalities and informalities; to amend and/or cancel the RFP prior to the time of submission; and to correct any proposal erroneously made as a result of a clerical error on the part of the Town. The Town reserves the right to make such selection, as in its judgment, is best suited for the purpose intended.

The Proponent will be required to sign and submit with their proposal a Certificate of Non-Collusion (Addendum B) and Tax Compliance Certification (Addendum C).

J. Insurance Coverage

The Contractor must be able to provide evidence of the insurance coverage as outlined in Addendum D

J. Confidentiality

Proposals will be kept confidential until after they have been evaluated. A log will be maintained of proposals received, but proposals are not opened publicly.

K. Proposed schedule:

RFP Issued.....	02/6/17 at 10:00 a.m.
Questions Due.....	02/27/2017 by 5:00 p.m.
Proposals Due.....	03/3/2017 by 11:00 a.m.

Section III THE PROPOSAL

A. The Scope of Services for this RFP is set forth in Addendum A.

B. Qualifications/Certifications/Résumé and Operations Plan

The following information should be provided in a separate sealed envelope marked “Greenfield-Property Tax Assessment Services – Proposal”.

The Town of Greenfield utilizes the Patriot Properties’ AssessPro appraisal system in house. Therefore, each Contractor must show evidence of familiarity with the Patriot Properties’ system by submitting a list of projects previously worked on that required the use of the Patriot Properties’ AssessPro Appraisal System.

In addition, bidders should provide detailed information addressing each of the following areas:

- History of the company and Résumés of officers
- Profile of the company including a list of majority stockholders, assets and liabilities.
- Information regarding law suits relevant to the requested services that are pending or have been resolved within the past 12 months.

Failure to be forthright in disclosure shall be grounds for disqualification of a vendor. This section shall not be interpreted to require the disclosure of information shielded from disclosure by State or Federal Statutes and/or court order.

C. Bid Response Elements

- Entity Qualifications
- List of current clients including contact information
- Description of entity’s experience with providing requested services
- Evidence of Insurance

D. Cost/Pricing Proposal

The following information should be provided in a separate sealed envelope marked “Greenfield Property Tax Assessment Services – Cost/Pricing”:

- The proposal should reflect the annual cost for the items in the Scope of Work with projected increases for the life of the contract:
- Please note that for pricing purposes, under any approved contract, the next revaluation year will be 2017.

Section IV- EVALUATION CRITERIA

1. Evaluation Criteria that will be used by the Selection Team are:

- A. General experience and technical competence
 - Extent of business; size of operation
 - Management experience of company
 - Financial capacity and security of the company
- B. Overall impression of proposal
 - Organization, clarity, completeness, thoroughness
 - Approach to scope of services
- C. Payment/Value of proposed services that would be of maximum benefit to the Town

2. Comparative Criteria

The following rating will be used to evaluate those Proponents that meet the minimum evaluation criteria above. Those proposals that do not meet the minimum criteria may be reviewed at the Committee’s discretion. If a proposal scores *Unacceptable* on any of the following comparative criteria, the Committee may decide not review it any further. The Committee will consider the following comparative criteria for award:

<i>Highly advantageous</i>	Proposal exceeds the specified criterion
<i>Advantageous</i>	Proposal meets evaluation standard for the criterion.
<i>Not Advantageous</i>	Proposal does not fully meet the evaluation criterion, omits a question, or does not address the element issue at some or all levels

The criteria that will be used for comparative purposes are as follows:

1. Knowledge and Experience with Computer Assisted Mass Appraisal System:

Highly Advantageous: Proponent has at least has more than ten (10) years of working with Mass Appraisal System.

Advantageous: Proponent has at least has at least five (5) but less than ten (10) years of working with Mass Appraisal System.

Not Advantageous: Proponent has less than five (5) years of working with Mass Appraisal System.

2. Experience Conducting Residential and Commercial/Industrial Revaluations.

Highly Advantageous Proponent has conducted a minimum of five (5) revaluation projects within the Commonwealth utilizing the Patriot Properties AssessPro software and each of which included the valuation of 5,000 or more real parcels

Advantageous: Proponent has conducted a minimum of three (3) revaluation projects within the Commonwealth utilizing the Patriot Properties AssessPro software and each of which included the valuation of 5,000 or more real parcels

Not Advantageous: Proponent has conducted less than three (3) revaluation projects within the Commonwealth utilizing the Patriot Properties AssessPro software and each of which included the valuation of 5,000 or more real parcels.

3. Experience with Appellate Tax Board:

Highly Advantageous: Prepared for and/or represented municipalities in ten (10) or more ATB hearings with at least five (5) being commercial or industrial.

Advantageous: Prepared for and/or represented municipalities in four (4) to ten (10) ATB hearings with at least three (3) being commercial or industrial.

Not Advantageous: Prepared for and/or represented municipalities in less than four (4) ATB hearings.

3. Miscellaneous

Any contract awarded as a result of this RFP will be awarded without discrimination on the basis of race, color, religion, age, sex, sexual orientation, political affiliation or national origin.

SCOPE OF SERVICES

The successful proposal will fully describe the delivery, scope, and level of service of the following:

1. All data listing including but not limited to cyclical, permits, overvaluations and sales.
2. All data listing as required to keep up with the 9/10 year cycle of 100% as required by the Department of Revenue.
3. Physical inspections of residential, industrial, commercial and exempt properties to obtain sufficient data to determine full and fair values of both land and buildings.
4. Conferences with property owners, private appraisers, attorneys, assessors, tax representatives and others relative to the assessed values on properties.
5. Maintenance of current knowledge of real estate market trends to establish appropriate market values.
6. All mapping, lot splits and combines. Creation/deletion of parcels using Patriot Properties software including annotations. Maintenance, correction and updating of information in the Town's computer assisted Mass Appraisal System. Entry of property characteristics to correct assessment value and other data to maintain system.
7. Discovery, listing and valuation of all personal property in the Town. Physical inspections of businesses in town to gather information regarding personal property valuation. Entry of information into computer assisted personal property appraisal system to keep assessments current and maintain system.
8. Analysis and review of pertinent sales information that will affect the five year revaluation.
9. Development of neighborhood delineation, neighborhood map, neighborhood modifiers and new land schedules as indicated by vacant land sales, land residuals and income residual analysis.
10. Implementation of new land valuations and adjust all cost schedules as indicated by analysis in order to produce new valuations meeting the Department of Revenue's statistical requirements for Certification of Values.
11. Provision of supplemental income, expense and vacancy data from neighboring communities.
12. Development of income approach values for all applicable commercial, industrial, apartment and mixed use property as well as all conforming use mobile home parks and special use properties.
13. Reconciliation of indicated income approach values and cost market values to a final value estimate.
14. Provide the Chief Assessor with a working knowledge of all residential, commercial/industrial and other D.O.R. triennial certification requirements.
15. Provide the Chief Assessor with knowledge of any changes / alterations to property data in keeping with the above scope of services.

16. Preparation and defense of up to 3 commercial / industrial values at the Appellate Tax Board each year as needed. Assist with Assessor's preparation for defense of any other Appellate Tax Board filings.
17. Assistance to the Board of Assessor's in completion of the LA13 New Growth report and associated spreadsheets within the MA Department of Revenue Gateway.
18. Meeting with the Board of Assessors as needed to discuss and review new land schedules and documentation.
19. Meeting with D.O.R. representatives and provision of all statistical sales data associated documentation and spreadsheets necessary to achieve Certification.

INSURANCE REQUIREMENTS

Before starting, and until completion of the guarantee period, the Contractor shall procure, deposit, and maintain with the Town, insurance satisfactory to the Town as follows:

- A. Workmen’s Compensation and Employer’s Liability Insurance as required by the Workmen’s Compensation Laws of the Commonwealth of Massachusetts.
- B. Comprehensive General Liability Insurance covering Bodily Injury and Property Damage as follows:

Limits of Liability:

Bodily Injury *	\$300,000 each person \$500,000 each occurrence \$500,000 aggregate products
Property Damage *	\$100,000 each occurrence \$100,000 aggregate operations \$100,000 aggregate protective \$100,000 aggregate products \$100,000 aggregate contractual

* Or \$500,000 single limit combined Bodily Injury and Property Damage.

The Comprehensive General Liability Policy shall provide insurance for the Contractor for Bodily Injury and Property Damage to third persons arising out of:

1. Work performed by the Contractor himself with his own employees, called “premises operations.”
2. Work performed by his subcontractors, called “sublet work” or Independent Contractors (this is referred to as Contractor’s Protective Liability).
3. The Contractor’s liability assumed under this contract, called “Hold Harmless” clauses or indemnity agreement. (This is referred to as Contractual Liability Insurance).
4. Products liability coverage covering the completed building or installation or products furnished. (This is called Products Liability Insurance for the manufacturer and Complete Operations Liability Insurance for the Contractor).

5. If any work is to be performed below the surface of the ground, the coverage shall be extended to include protection against property damage caused by explosion (including blasting), collapse of structures and damage to underground pipes and utilities. (This is known as “XCU” coverage).
- C. Comprehensive Automobile Liability Insurance covering Bodily Injury and Property Damage, as follows:

Limits of Liability

Bodily Injury	\$300,000 each person \$500,000 each accident
Property Damage	\$100,000 each accident

This insurance is to apply with respect to all owned or hired vehicles of the Contractor and non-ownership protection for all employees of the Contractor engaged in the performance of this contract.

- D. All policies shall be so written that the Town will be notified of cancellation or restrictive amendment at least 30 days prior to the effective date of such cancellation or amendment. Certificates from the insurance carrier stating the limits of liability and expiration date shall be filed in triplicate with the Town before operations are begun. Such certificates not only shall name the types of policy provided, but also shall refer specifically to this Contract* and article and the above paragraphs in accordance with which insurance is being furnished and shall state that such insurance is as required by such paragraphs of this Contract and shall be sufficiently comprehensive as to permit the owner to determine that the required insurance coverage has been provided without the necessity of examining the individual insurance policies.

If the initial insurance expires prior to completion of the Work, renewal certificates shall be furnished by the date of expiration.

* If blanket coverage is furnished, this particular Contract need not be referred to.

Addendum C
RFP: Property Tax Assessment Services
RFP No.: 17-08

AGREEMENT

THIS AGREEMENT, executed this _____ day of _____ 2017 (herein referred to as the “AGREEMENT”), by and between the Town of Greenfield, Massachusetts, acting by and through its Purchasing Office, duly authorized therefore, which acts solely for said Town and without personal liability to itself, party of the first part, and _____.

WITNESSETH, that the parties to these presents, each in consideration of the undertakings, promises, and agreements on the part of the other herein contained, have undertaken, promised and agreed and do hereby undertake, promise, and agree, the party of the first part for itself, its successors and assigns, and the party of the second part for himself and his heirs, executors, administrators, successors and assigns, as follows:

The Contractor agrees to provide all services and information required for **property assessment services required under the Scope of Services outlined in RFP 17-08, dated February 6, 2017.**

In consideration of the foregoing premises, the Town agrees to pay and the Contractor agrees to receive as full compensation for everything furnished and done by the Contractor under this contract; including all work required, for all loss or damage arising out of the nature of the work aforesaid or from any delay or from any unforeseen obstruction or difficulty encountered in the prosecution of the work, and for all risks of every description connected with the work, and for all expenses incurred by or in consequence of the suspension or discontinuance of the work as herein specified, and for well and faithfully completing the work, and the whole thereof, as herein provided, such price or prices as are set out in the accompanying proposal, and for all work required, for which there is no item in the proposal, such compensation as is provided for in the aforesaid specifications.

The Contractor’s original bid price for this project is:

Year One (July 1, 2017-June 30, 2018: \$ _____ .00 Dollars

Year Two (July 1, 2018-June 30,2019: \$ _____ .00 Dollars

Year Three(July 1, 2019-June 30, 2020: \$ _____ .00 Dollars

Total Contract Price: _____ : \$ _____ .00 Dollars

OWNER: TOWN OF GREENFIELD

By: _____

Date: _____

Title: Mayor

FOR THE CONTRACTOR: _____.

By: _____

Date: _____

Title: _____

AWARDING AUTHORITY APPROVALS

Approved as to availability of appropriation:

Awarding Authority Accountant

Date: _____

* Certification that there is an appropriation in the amount of this Agreement and that the Mayor has been authorized to execute the Agreement and to approve all requisitions and change orders

Addendum D
RFP: Property Tax Assessment Services
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CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of person making proposal

Name of business

Addendum E
RFP: Property Tax Assessment Services
RFP No.: 17-08

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of person submitting bid or proposal

Name of business

Addendum F
RFP: Property Tax Assessment Services
RFP No.: 17-08

BIDDER CHECKLIST

- Submitted all information as requested
- Submitted signed proposal in one sealed envelope duly marked
- Submitted separate pricing proposal in one sealed envelope duly marked
- Signed and dated Cost / Pricing Proposal
- Received _____ number of addendum(s).
- No conditions or restrictions have been placed by the company on this proposal that would declare it non-responsive.
- Prepared to provide the insurance required.

Signature of Authorized Official Date

Company Name

Addendum G
RFP: Property Tax Assessment Services
RFP No.: 17-08

Current LA-4