



CITY OF GREENFIELD

RFP 18-18

Property Tax Assessment Services

Documents available: April 17, 2018 @ 10:00 a.m.

Questions Due By: April 25, 2018 @ 2:00 p.m.

Answers available: April 30, 2018 @ 4:00 p.m.

Bid Due Date: May 08, 2018 @ 2:00 p.m.

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RFP NUMBER: 18-18

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Advertisement for Bidders

City of Greenfield
Office of the Mayor
14 Court Square
Greenfield, MA 01301

The City of Greenfield, MA is seeking sealed proposals from qualified vendors to undertake the task of Property Tax Assessment Services on all Real and Personal Property located in the City of Greenfield. Greenfield is a City 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 to allow the City to evaluate multiple options and determine which proposal and financial arrangement best meets the City's needs.

As of 10:00 a.m. on April 17, 2018, copies of this Request for Proposal for Property Tax Assessment Services may be obtained from the City 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) 772-1500 x-2130 for additional information.

All proposals shall be sealed and marked as follows:

RFP 18-18 – City of Greenfield – Property Tax Assessment Non-Price Proposal
RFP 18-18 – City of Greenfield – Property Tax Assessment Pricing Proposal

Sealed proposals submitted in accordance with the instructions outlined in the RFP documents will be accepted until 2:00 p.m. May 08, 2018. Fax or electronic submissions will not be accepted.

The Proposal awarding authority is:

Office of the Mayor
City of Greenfield
14 Court Square
Greenfield, MA 01301

City of Greenfield

Request for Proposal (RFP)

Property Tax Assessment Services

Introduction

The City of Greenfield, MA is seeking sealed proposals from qualified vendors to undertake the task of Property Tax Assessment Services on all Real and Personal Property located in the City of Greenfield. Greenfield is a City of approximately 17,500 residents located in Western Massachusetts. It currently has 7,000 parcels with a taxable value of approximately \$1.4 billion.

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

All information pertaining to the proposer's technical and management approach to completing this project as well as the proposed cost, timetable and staffing plan shall be presented in the proposal. The City is licensed to utilize the Assess Pro™ Software of Patriot Properties of Marblehead, Massachusetts and is not looking to change systems. The proposer shall demonstrate an ability to work with the Patriot Assess Pro system by submitting information pertaining to other projects for which the contractor has used this appraisal system.

Notice of this RFP is published in COMMBUYS (The official procurement record system for the Commonwealth of Massachusetts), the Massachusetts Goods and Services Bulletin, (a requirement of the MA Uniform Procurement Law (Chapter 30B, section 5), *The Recorder* (a newspaper of general circulation) and is posted on the City's website (www.greenfield-ma.gov) under "Departments", "Purchasing", "ActiveBids/RFP/RFQ"

Submission Deadline and Instructions

- The City will accept sealed proposals delivered in person or by mail. All sealed proposals must be received by 2:00 p.m. May 08, 2018 to be considered. Any proposals submitted after that date and time will be returned unopened.
- Proposals submitted by fax or by electronic mail will not be considered.
- Qualified proposers shall submit one original and five (5) copies of their non-price proposals in a sealed envelope and that package must be clearly marked: "Name of

Proposer; RFP 18-18 City of Greenfield Property Tax Assessment Services Non-Price Proposal”.

- Proposers shall submit one copy of their price proposal in a separate sealed envelope clearly marked “Name of proposer; **RFP 18-18; City of Greenfield Property Tax Assessment Services Price Proposal”.**

All sealed proposals must be received by May 08, 2018 at 2:00 p.m. All outer envelopes must be labeled as per instructions and mailed or hand delivered to the following address.

Office of the Mayor
City of Greenfield
14 Court Square
Greenfield, MA 01301

The City of Greenfield is the awarding authority and reserves the right to reject any and all services or parts of services; to waive any defects, information, and minor irregularities; to accept exceptions to these specifications; and to award contracts or to cancel this RFP if it is in the City’s best interest to do so.

There will be no public opening of proposals. Resumes and proposed contracts will not be made public until after the City has completed its evaluation. Price proposals will be securely kept by the Mayor’s Office and not disclosed to the selection panel until it has completed evaluation of the proposed contracts.

All non-price proposals must include a non-collusion form, tax compliance certificate and (in the case of corporations) a certificate of corporate votes. All proposals must be signed by an authorized individual (s). In addition the proposer must submit, as part of its proposal:

- A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the proposer for at least ninety (90) calendar days from the date the proposal is due
- A listing of Massachusetts municipalities for which the contractor has used Patriot Properties Software, including contact information
- Two years of the proposer’s financial statements.

The City shall not be responsible for proposals arriving late due to couriers, deliveries to wrong locations, express mailing services etc. or any reason whatsoever. Postmarks will not be considered.

Any proposal may be withdrawn on written request received prior to the time fixed for the submission of proposals.

The successful proposer shall comply with all federal, state and local laws and regulations pertaining to the performance of the contract.

Proposal Questions

Any and all Questions concerning this RFP shall be submitted in writing by 2:00 p.m., April 25, 2018 to the Procurement Office at Purchasing@Greenfield-MA.gov. The title of the submission must be:

Questions - RFP 18-18 City of Greenfield – Property Tax Administration Services

Written responses to any questions that the City determines are relevant to all will be emailed in the form of an addendum to all known bid holders by 4:00 p.m. on April 30, 2018.

Proposed Contract

The proposal will include a sample contract covering all of the substantive issues addressed in this RFP. The City reserves the right to develop its own contract for final signing. The successful bidder's technical and price proposals will become an addendum to the contract.

Important - the draft contract should not state the bid price but provide appropriate blanks for same. Remember, the price proposal is to be provided under separate cover.

The contract is for a period to extend from July 1, 2018 and ending June 30, 2021. Note that the City is scheduled for recertification in FY 2022.

All costs involved in preparing the Proposal will be borne by the Proposer. The Town will not be liable for any costs associated with the creation of the Proposal.

References

Vendors presently serving other municipal clients are asked to submit the names of those clients, relevant experience, the type of staff assigned, and a contact person for reference purposes.

Scope of Work

Reporting to the Office of the Mayor and the Finance team, the selected firm will provide the following, contractual services to the City. The services to be provided are as follows:

- Direct and compile the annual tax recap process by providing assessment information required to help establish tax rates
- Prepare new growth revenue reports and obtain Department of Revenue certification of same
- Prepare for and appear at the annual tax classification hearing;
- Prepare the preliminary and actual real estate and personal property billing file for the Tax Billing system, working with the CAMA System to insure the successful upload to the tax collection module;
- Make available to the City a qualified Associate Assessor to staff the office at least 1 day per week basis for at least 52 days a year in order to sufficiently conduct those tasks normally carried out by staff and to oversee the day-to-day operations of the Assessor's Office. In addition, must be able to provide coverage for the office for Administrative Assistance during absences. Responsibilities include interacting with taxpayers, the Board of Assessors, Mayor, and various City boards by providing assistance on matters of property valuation and taxation; inspect, review, and formulate recommendations on properties under abatement appeal; prepare DOR reports as needed; conduct sales verifications and inspections; assist office with budget and City meeting related tasks; lay the ground work for the interim year revaluations; calculate chapter rollbacks; set-up new tax accounts based on approved land divisions; conduct comprehensive assessment-to-sale ratio studies;
- Prepare personal property inspections as required
- Provide the services of a Senior Assessor for an additional 100 hours for support, training and supervision, as well as, "higher order" technical assistance to the Associate Assessor, Administrative Assessor and other City hall staff;
- Conduct inspections of all properties for which the City's building department has issued building permits or when requested
- Insure that the records of the office, including maps and CAMA system records are maintained and current.
- Prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the City's professional representative on property tax valuation matters.

- Meet with the Board of Assessors twice each month, or as required
- Meet with other financial officers of the City in order to effectively coordinate and facilitate the City's financial affairs,
- Assist the City in such other capacities as the Mayor and/or the Board of Assessors may approve.
- The contracting firm will be responsible for all costs of employment including FICA, unemployment taxes, health insurance, retirement, training, and mileage.
- All data listing including but not limited to cyclical, permits, overvaluations and sales.
- All data listing as required to keep up with the 9/10 year cycle of 100% as required by the Department of Revenue.
- Physical inspections of residential, industrial, commercial and exempt properties to obtain sufficient data to determine full and fair cash values of both land and buildings.
- Conferences with property owners, private appraisers, attorneys, assessors, tax representatives and others relative to the assessed values on properties.
- Maintenance of current knowledge of real estate market trends to establish appropriate market values.
- 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. Update system photographs as necessary.
- 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.
- Analysis and review of pertinent sales information each year that will affect the five year revaluation.
- Development of neighborhood delineation, neighborhood map, neighborhood modifiers and new land schedules as indicated by vacant land sales, land residuals and income residual analysis.
- 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.

- Provision of supplemental income, expense and vacancy data from neighboring communities.
- 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.
- Reconciliation of indicated income approach values and cost market values to a final value estimate.
- Provide the Board of Assessors with a working knowledge of all residential, commercial/industrial and other D.O.R. triennial certification requirements.
- Provide the Board of Assessors with knowledge of any changes/alterations to property data in keeping with the above scope of services.
- Preparation and defense of all commercial / industrial values at the Appellate Tax Board each year as needed.
- 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.
- Meeting with D.O.R. representatives and provision of all statistical sales data associated documentation and spreadsheets necessary to achieve Certification.
- Vendor is responsible for assuring the city receives Certification

Minimum Qualifications

- Greenfield seeks a firm with considerable tax assessment and administration experience to oversee the operations of the Assessors' Office. All staff provided by the proposer will possess these minimum qualifications:
 - Have successfully completed the Massachusetts Department of Revenue Course 101 on property tax administration and have received certification;
 - Supervising Assessor (Senior Assessor) will have at least ten years experience as a principal assessor or equivalent within the Commonwealth of Massachusetts, and have worked simultaneously in two or more communities and demonstrated success in managing the affairs of multiple offices, hold a bachelor's degree in business administration, real estate, economics or similar field of study, successfully completed no less than 300 hours of specialized valuation and tax administration coursework through either the International Association of Assessing Officers (IAAO) or the Massachusetts Association of Assessing Officers (MAAO);

- Associate Assessor will be an experienced mass appraiser, hold a real estate appraisal license and bachelor's degree, and have successfully completed no less than 80 hours of specialized valuation and tax administration coursework and have obtained certification through either the International Association of Assessing Officers (IAAO), or the Massachusetts Association of Assessing Officers (MAAO);
- Demonstrate considerable experience with AssessPro, the City's CAMA (MUNIS) and online GIS systems.

INSURANCE REQUIREMENTS

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

Worker's Compensation and Employer's Liability Insurance as required by the Worker's Compensation Laws of the Commonwealth of Massachusetts.

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:

Work performed by the Contractor himself with his own employees, called "premises operations."

Work performed by his subcontractors, called "sublet work" or Independent Contractors (this is referred to as Contractor's Protective Liability).

The Contractor's liability assumed under this contract, called "Hold Harmless" clauses or indemnity agreement. (This is referred to as Contractual Liability Insurance).

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).

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).

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.

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.

Evaluation Criteria

All vendors submitting proposals will be evaluated by the Mayor and/or his designees based upon the ability of the respondent to meet the specifications outlined herein and if all criteria required in this proposal have been met.

The proposal should have completed all forms attached in this RFP, have submitted it properly and on time, and have submitted a reference/client list. The ability of the respondent to meet contracted requirements will also be considered as well as the capability, integrity and reliability of the respondent to meet contract regulation.

In accordance with MGL 30B the proposals submitted will be reviewed and rated on a scale consisting of *highly advantageous*, *advantageous* and *not advantageous*.

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 evaluation component above will be scored as follows:

Highly Advantageous = 2 points, *Advantageous* = 1 point, and *Not advantageous* = 0 points.

Criteria 1. Massachusetts business/resident:

- *Highly advantageous* Lives or business office within 25 miles from City
- *Advantageous* Lives or business office within 50 miles from City
- *Not advantageous* Lives or business office outside of Massachusetts

Criteria 2. Experience in Massachusetts providing contract assessment services:

- *Highly advantageous* Ten or more years
- *Advantageous* More than five and less than ten years
- *Not advantageous* Less and equal to five years

Criteria 3. Experience working with multiple communities:

- *Highly advantageous* Experience working with more than three communities at one time
- *Advantageous* Experience working with two to three communities at one time
- *Not advantageous* No experience working with multiple communities

Criteria 4. Computer Assisted Mass Appraisal Systems knowledge and experience:

- *Highly advantageous* At least 10 years working
- *Advantageous* At least 5 years working
- *Not advantageous* No experience

Criteria 5. Geographic Information System experience and knowledge:

- *Highly advantageous* Over seven years experience
- *Advantageous* Four to seven years experience
- *Not advantageous* One to three years experience

Criteria 6. Conducted Residential and Commercial/Industrial Revaluations:

- *Highly advantageous* Conducted four or more residential revaluations and two or more commercial/industrial revaluations.
- *Advantageous* Conducted two to three residential revaluations and at least one complete commercial/industrial revaluation.
- *Not advantageous* Conducted one or fewer revaluations of residential properties and not commercial/industrial revaluations.

Criteria 7. Prepared cases for and represented a municipality before the Appellate Tax Board:

- *Highly advantageous* Prepared for and represented municipalities in ten or more Appellate Tax Board hearings with at least five cases being commercial or industrial properties.
- *Advantageous* Prepared for and represented municipalities in four to ten Appellate Tax Board hearings with at least three cases being commercial or industrial properties.
- *Non advantageous* Prepared for and represented municipalities in three or less Appellate Tax Board hearings.

Conditions of Award

It is the intent of the City 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 Review Committee shall be the sole judge of the firm's qualifications and whether the proposal is in the best interests of the City.

The City 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 City's satisfaction within the prescribed time. The City 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 City of Greenfield website.

Up to the time of signature of contract, the City 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.

Amendments to this Request for Proposal

The City may revise this RFP by issuing written addenda. Addenda will be posted on the City'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.

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 individual submitting bid or proposal

Name of Business

TAX COMPLIANCE CERTIFICATION

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

Signature of individual submitting bid or proposal

Name of business

Corporate Authority Certificate

I, (name) _____ being the
(title) _____ of (name of
corporation) _____ corporation
hereby certify that at a duly posted meeting of the Board of Directors held on
(date) _____ that (name of authorized person)

was authorized to sign all commitments and documents made in response to this RFP for the City of Greenfield Property Tax Assessment Services and they are further authorized to sign any contract made pursuant to this RFP.

Authorized Signature _____ Date _____

*** Must be accompanied by a copy of the minutes of the Board meeting

Notary Statement

Commonwealth of Massachusetts _____ County of _____

On this the _____ of _____, _____ before me, personally
(day) (Month) (year)
Appeared _____, who proved to me through

satisfactory evidence of identity, which was _____ to be the person(s) whose name (s) was/were signed above and who swore and affirmed to me that the contents of the document are truthful and accurate to the best of his/her/their knowledge and belief.

_____ (Signature of Notary Public) _____ (Printed Name of Notary)

My commission expires _____

BIDDER CHECKLIST

- () Submitted all information as requested:
 - () One signed original and 5 copies of the non-price proposal in one sealed envelope duly marked
 - () One signed separate pricing proposal in one sealed envelope duly marked
 - () A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the proposer for at least ninety (90) calendar days from the date the proposal is due
 - () A listing of Massachusetts municipalities for which the contractor has used Patriot Properties Software, including contact information
 - () Two years of the proposer's financial statements.
 - () Signed Non-Collusion Form
 - () Signed Tax Compliance Certificate
 - () List of references
 - () Certificate of Corporate Vote (in the case of a corporation)
- () 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