

TOWN OF WEST BOYLSTON, MASSACHUSETTS

Request for Proposals for Property Tax Assessment Services

OVERVIEW AND BID FORMAT

Introduction

The Town of West Boylston (hereafter “the Town” or “West Boylston”) is seeking resumes, sample contracts and price proposals from qualified firms to provide the Town with property tax assessment services; such services to be described below. 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, Section 6. Such a process will enable the Town to evaluate the experience of the contractor and his or her ability to carry out the Towns 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.

The Town reserves the right to postpone or cancel the awarding of a contract for any and all reasons, but especially if price bids exceed available funding.

Proposal Deadline, Questions, Format and Other Requirements

DUE DATE FOR SUBMITTING PROPOSALS IS, March 31, 2009 AT NOON
(LOCAL TIME).

Bidders shall submit five (5) copies each of their sample contract and price proposal in separate sealed envelopes. All envelopes must be clearly labeled as to their contents, whether Sample Contract or Price Proposal.

Proposals must be delivered no later than the specified time to:

Leon A. Gaumond Jr., Town Administrator

Town of West Boylston
127 Hartwell Street
West Boylston, MA 01583

Title: West Boylston – Property Tax Administration Services Proposal

Late proposals will not be accepted and will be returned unopened. Proposed prices must be firm for 90 days from the date the proposal is due.

There will be no public opening of proposals. Resumes and proposed contracts will not be made public until after the Town has completed its evaluation. Price proposals will be securely kept by the Town Administrator and not disclosed to the selection panel (Board of Assessors) until it has completed evaluation of the proposed contracts.

Questions concerning this RFP should be submitted in writing by March 18, 2009 to:

Leon A. Gaumond Jr., Town Administrator
Town of West Boylston
127 Hartwell Street
West Boylston, MA 01583

Title: Questions: West Boylston – Property Tax Administration Services Proposal

Written responses to any questions that the Town determines are relevant to all will be faxed to all individuals that received the RFP.

The Town 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.

Scope

Reporting to the Board of Assessors (the Board), the selected firm will provide the following, contractual services to the Town. The services to be provided are as follows:

1. Direct and compile the annual tax recap process by , providing assessment information required to help establish tax rates

2. Prepare new growth revenue reports and obtain Department of Revenue certification of same;
3. Prepare for and appear at the annual tax classification hearing;
4. 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;
5. Make available to the Town a qualified associate assessor to staff the office at least 1 day per week basis for at least 46 days a year in order to sufficiently conduct those tasks normally carried out by a Principal Assessor and to oversee the day-to-day operations of the Assessors Office. Responsibilities include interacting with taxpayers, the Board of Assessors, Town Administrator, and various Town 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 Town 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;
6. Prepare personal property inspections as required;
7. 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 town hall staff;
8. Conduct inspections of all properties for which the Town's building department has issued building permits or when requested
9. Insure that the records of the office, including maps and CAMA system records are maintained and current.
10. Prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the Towns expert on property tax valuation matters.
11. Meet with the Board of Assessors once a month, or additionally at their request,
12. Meet with other financial officers of the Town in order to effectively coordinate and facilitate the Towns financial affairs,
13. And, assist the Town in such other capacities as the Board of Assessors and/or the Town Administrator may approve.

The contracting firm will be responsible for all costs of employment including FICA, unemployment taxes, health insurance, retirement, training, and mileage.

Minimum Qualifications

West Boylston 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:

1. Have successfully completed the Massachusetts Department of Revenue Course 101 on property tax administration;
2. 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);
3. 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 through either the International Association of Assessing Officers (IAAO), or the Massachusetts Association of Assessing Officers (MAAO);
4. Demonstrate considerable experience with the town's CAMA system.

Criteria for review

All vendors submitting proposals will be evaluated by the Town Administrator or his designee 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 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 non-advantageous, advantageous and most advantageous. The evaluation component above will be scored as follows: Non advantageous = 0 points, Advantageous = 1 point, and Most Advantageous = 2 points.

1. Massachusetts business/resident:
 - Non advantageous – Lives or business office outside of Massachusetts

- Advantageous – Lives or business office within 50 miles from Town
 - Most advantageous – Lives or business office within 25 miles from Town
2. Experience in Massachusetts providing contract assessment services:
 - Non advantageous – Less and equal to five years.
 - Advantageous – More than five and less than ten years.
 - Most advantageous – Ten or more years
 3. Experience working with multiple communities:
 - Non advantageous – No experience working with multiple communities.
 - Advantageous – Experience working with two to three communities at one time.
 - Most advantageous – Experience working with more than three communities at one time
 4. Computer Assisted Mass Appraisal Systems knowledge and experience:
 - Non advantageous – No experience
 - Advantageous – At least 5 years working
 - Most advantageous – At least 10 years working
 5. Geographic Information System experience and knowledge:
 - Non advantageous – One to three years experience
 - Advantageous – Four to seven years experience
 - Most advantageous – Over seven years experience
 6. Conducted Residential and Commercial/Industrial Revaluations:
 - Non advantageous – Conducted one or fewer revaluations of residential properties and not commercial/industrial revaluations.
 - Advantageous – Conducted two to three residential revaluations and at least one complete commercial/industrial revaluation.
 - Most advantageous – Conducted four or more residential revaluations and two or more commercial/industrial revaluations.
 7. Prepared cases for and represented a municipality before the Appellate Tax Board:
 - Non advantageous – Prepared for and represented municipalities in three or less Appellate Tax Board hearings.
 - Advantageous – Prepared for and represented municipalities in four to ten Appellate Tax Board hearings with at least three cases being commercial or industrial properties.
 - Most advantageous – Prepared for and represented municipalities in ten or more Appellate Tax Board hearings with at least five cases being commercial or industrial properties.

Proposed Contract

The proposal will include a sample contract covering all of the substantive issues addressed in this RFP. The Town 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, 2009 and ending June 30, 2012

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.

CERTIFICATE OF NON-COLLUSION

TOWN OF WEST BOYLSTON

Assessor Service Contract

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)

(Name Of Person Signing Proposal)

(Name Of Business)

COMPLIANCE CERTIFICATION

TOWN OF WEST BOYLSTON

Assessor Service Contract

Qualification and Taxes: The Contractor represents that it is qualified to perform the services required under this contract and possesses or shall obtain all requisite licenses and permits.

Pursuant to MGL C.62C, S.49A, under the penalties of perjury that, to the best of its knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Employment Security Contributions and Compulsory Workers' Compensation Insurance: Pursuant to MGL C.151A, S.19 and MGL C.152, the Contractor certifies compliance with all laws of the Commonwealth relating to payments to the Employment Security System and all Commonwealth laws relating to required worker's compensation insurance policies.

Additional Income Disclosure: The Contractor certifies that the following amounts (attach list if applicable) represent all income due, or to become due, to the Contractor, for services rendered to the Commonwealth, any political subdivision or public authority, during the period of this contract.

(Signature)

(Name Of Person Signing Proposal)

(Name Of Business)

NON-DISCRIMINATION AND AFFIRMATIVE ACTION CERTIFICATION

TOWN OF WEST BOYLSTON

Assessor Service Contract

The Contractor agrees to comply with all applicable Federal and State statutes, rules and regulations prohibiting discrimination in employment, including but not limited to, the Americans with Disabilities Act 42 USC 12101, 28 CFR Part 35, or as amended; 29 USC S.791 et. seq.; Executive Orders 227, 237, 246; MGL C. 151B; and MGL C. 272, S. 92A, S98 et.seq., or any amendments to these provisions. Pursuant to Executive Orders 227 and 246, the Contractor is required to take affirmative actions designed to eliminate the patterns and practices of discrimination including providing written notice of its commitment to non-discrimination to any labor association with which it has an employment agreement, and to certified minority and women-owned businesses and organizations or businesses owned by individuals with disabilities. The Town of West Boylston shall not be liable for any costs associated with the Contractor's defense of claims of discrimination.

(Signature)

(Name Of Person Signing Proposal)

(Name Of Business)