
TOWN OF SUDBURY, MASSACHUSETTS
Request for Proposals
For
Property Tax Assessment Services

OVERVIEW AND PROPOSAL FORMAT

Introduction

The Town of Sudbury (hereafter "the Town" or "Sudbury") is seeking 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 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.

Each proposal shall consist of a non-price proposal and a price proposal. The non-price proposal and price proposal must each be enclosed in a separate, sealed envelope marked, "PRICE PROPOSAL" or "NON-PRICE PROPOSAL," as the case may be, along with the title of this RFP, "PROPERTY TAX ASSESSMENT SERVICES RFP." Each sealed envelope must then be sealed, together, in a third sealed envelope for deliver or mailing. The third envelope must also be marked, "PROPOSAL FOR PROPERTY TAX ASSESSMENT SERVICES" and indicate the Proposer's name and address. Failure to properly mark and deliver proposals may result in the rejection of the proposal.

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

Proposal Deadline, Questions, Format and Other Requirements

DUE DATE FOR SUBMITTING PROPOSALS is:
June 24, 2019 AT 4pm (LOCAL TIME).

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

Melissa Murphy-Rodrigues, Esq.
Chief Procurement Officer
Town of Sudbury
278 Old Sudbury Road
Sudbury, MA 01776

Late proposals will not be accepted and will be returned unopened. Proposed prices must be firm for 30 days from the date the proposal is due.

There will be no public opening of proposals. Proposals will not be made public until after the Town has completed its evaluation. Price proposals will be securely kept by the **Chief Procurement Officer** and not disclosed until evaluation of proposals is complete.

Questions concerning this RFP should be submitted in writing by:
June 19, 2019

Written responses to any questions that the Town determines are relevant to all will be distributed to all individuals that received the RFP in the form of “addenda” to this 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.

The Sudbury Town Manager, as chief procurement officer, shall unconditionally accept a bid without alteration or correction, except as provided in this paragraph. An offeror may correct, modify, or withdraw a bid by written notice received in the office designated in the invitation for bids prior to the time and date set for the bid opening. After bid opening, an offeror may not change the price or any other provision of the bid in a manner prejudicial to the interests of the governmental body or fair competition. The Town Manager shall waive minor informalities or allow the offeror to correct them. If a mistake and the intended bid are clearly evident on the face of the proposal document, the Town Manager shall correct the mistake to reflect the intended correct proposal and so notify the offeror in writing, and the offeror may not withdraw the proposal. An offeror may withdraw a proposal if a mistake is clearly evident on the face of the proposal document but the intended correct proposal is not similarly evident.

The Sudbury Town Manager shall designate the individual or individuals responsible for the evaluation of the proposals on the basis of criteria other than price (see further below in this RFP). The designated individuals shall prepare their evaluations based solely on the criteria set forth in the request for proposals. Such criteria shall include all standards by which acceptability will be determined as to quality, workmanship, results of inspections and tests, and suitability for a particular purpose, and shall also include all other performance measures that will be utilized.

The Town Manager shall determine the most advantageous proposal from a responsible and responsive offeror taking into consideration price and the evaluation criteria set forth in the request for proposals. The Town Manager shall award the contract by written notice to the selected offeror within the time for acceptance specified in the request for proposals. The parties may extend the time for acceptance by mutual agreement. The Town Manager may condition an award on successful negotiation of the revisions specified in the evaluation (if any), and shall explain in writing the reasons for omitting any such revision from a plan incorporated by reference in the contract.

Scope

Reporting to the Finance Director, the selected firm will provide the following contractual services to the Town. The services to be provided are as follows:

1. Assist the Director of Assessing in the day-to-day management and operations of the office by providing regular consultation via scheduled in-office meetings and work sessions, telephone, and e-mail support;
2. Prepare in conjunction with the Director of Assessing an annual assessment calendar detailing the various assessment tasks to be carried out by the office with proposed completion dates;
3. Provide staff training;
4. Inspect all properties for which a building permit has been issued;
5. Assist the Director of Assessing with the preparation of all Department of Revenue (DOR) reports, surveys, and

data submittals including the annual tax recapitulation; Processing an evaluation of local real estate appeals;

6. Make available to the Town a qualified associate assessor to assist the office for minimum number of days in a year (to be specified in your response) in order to sufficiently conduct tasks as determined by Scope. Duties to include but are not limited to interacting with taxpayers, the Board of Assessors, Finance Director, 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;
7. Conduct the fiscal year 2020, 2021 and 2022 interim property valuations by inspecting and validating market sales, and conducting an assessment-to-sale ratio study to determine the level and uniformity of standing assessments;
8. Review map changes and associated assessor software system accounts to insure that records are properly configured and that resulting valuations reasonably estimate fair market valuation;
9. Prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the Town's expert on property tax valuation matters;
10. Interface with the public and provide assistance on valuation questions that cannot be addressed by in-house staff;
11. Review all real estate and personal property abatements, preparing recommendations to the Board of Assessors on suggested actions relative thereto;
12. Assist the Director of Assessing in completing those portions of the Town's annual recap for which assessment information is recorded, including forms LA-3, LA-4, LA-5, LA-10, LA- 13, OL-1 and Page 1;
13. Assist the Town in such other capacities as the Town Board of Assessors may approve;
14. Make available to the Town a qualified associate to conduct Personal Property state mandated inspections, to be completed for the fiscal year 2024 Certification.
15. Make available to the Town a qualified associate to conduct Commercial Property state mandated inspections.
16. Provide sufficient staff specifically assigned to Sudbury to fulfill all tasks listed above in this Scope of Services.

The Sudbury Town Manager, as chief procurement officer, shall not open the proposals publicly, but shall open them in the presence of one or more witnesses at the time specified in the request for proposals. Notwithstanding the provisions of G.L. c. 4, § 7, until the completion of the evaluations, or until the time for acceptance specified in the request for proposals, whichever occurs earlier, the contents of the proposals shall remain confidential and shall not be disclosed to competing offerors. At the opening of proposals, the Town Manager or her designee shall prepare a register of proposals that shall include the name of each offeror and the number of modifications, if any, received. The register of proposals shall be open for public inspection. The Town Manager may open the price proposals at a later time, and shall open the price proposals so as to avoid disclosure to the individuals evaluating the proposals on the basis of criteria other than price.

Non-Price Proposal Contents

1. Five copies of proposer's resume;
2. All documentation and information necessary or appropriate to demonstrate that proposer meets the qualifications set forth in the sections below entitled "Minimum Qualifications" and "Evaluation Criteria";
3. Completed and signed certificates, included in this RFP, i.e., Certificate of Non-collusion; Certificate of Tax Compliance; and Certificate of Non Discrimination and Affirmative Action.

Price Proposal Contents

Proposer's price proposal shall take the form of a one-page document, prepared by the proposer, stating (i) the total lump sum ANNUAL amount to be paid for each year of the proposed three-year contract, and (ii) the TOTAL three-year amount (i.e., the annual amount multiplied by three years) for all three years of the proposed contract. Such amount shall constitute full payment for all services set forth in and reasonably inferable from this RFP, all of which services Proposal shall be required to perform. Such amounts shall be invoiced on a monthly basis.

Minimum Qualifications

Sudbury 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, and proposers must include in their non-price proposals documentation and information demonstrating that they possess such qualifications, failing which the proposal may be rejected. If a proposer fails to meet the minimum qualifications, it shall not be permitted to have its proposal evaluated in accordance with the evaluation criteria set forth further below in this RFP:

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 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.

Evaluation Criteria

All proposals will be evaluated by the Finance Director 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 Finance Director or his designee will prepare a written evaluation for each proposal, which shall include the ratings for each criterion set forth below. The evaluation shall also include an overall "composite" rating for each proposal. Such written evaluation shall be forwarded to the Sudbury Town Manager upon completion of the evaluation of all proposals.

1. Massachusetts business/resident:
 - Non advantageous -Lives or business office outside of Massachusetts
 - Advantageous –Lives or business office within 50milesfrom 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.
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: Insurance

Included in this RFP is a form of contract. The successful offeror shall sign a contract in substantially the form of such contract.

The contract is for a period to extend from on or about July 1, 2019 and ending June 30, 2022.

The successful proposer shall be required to obtain insurance satisfying the requirements set forth in the form of contract included in this RFP, and shall, before execution of the contract, provide satisfactory evidence of such insurance.

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.

TOWN OF SUDBURY

CERTIFICATE OF TAXES/TAX ATTESTATION

Pursuant to M.G.L. Chapter 62C, Section 49A, I certify under penalties of perjury that the undersigned entity has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support..

Social Security Number, or
Federal Identification Number

Signature of Individual, or
Corporation Name

By:

Corporate Officer & Title (if applicable)

AFFIX CORPORATE SEAL

**TOWN OF SUDBURY
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, or
Corporation Name

By:

Corporate Officer & Title (if applicable)

AFFIX CORPORATE SEAL

TOWN OF SUDBURY
COMPLIANCE CERTIFICATION

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 complies 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.

(Signature)

(Name of Person Signing Proposal)

(Name of Business)

TOWN OF SUDBURY
NON-DISCRIMINATION AND AFFIRMATIVE ACTION
CERTIFICATION

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 Sudbury 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)