

TOWN OF STERLING, MASSACHUSETTS

Request for Proposals for Property Tax Administration Services

OVERVIEW AND BID FORMAT

The Town of Sterling (hereafter “the Town” or “Sterling”) is seeking proposals to provide the Town with property tax administration 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 conducted by under an RFP process, pursuant to Massachusetts General Laws, Chapter 30B, Section 6. Such a process will enable the Town to evaluate the contractor’s experience and ability to implement a fair and equitable taxation in the Town. Because property tax administration is an important component of the Town’s overall financial health, 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, and is subject to available appropriation.

Proposal Deadline, Questions, Format and Other Requirements

DUE DATE FOR SUBMITTING PROPOSALS IS

JUNE 7, 2018

By the close of business @5:00 PM

Further information may be obtained via town website

<https://www.sterling-ma.gov/>

Bidders shall submit two (2) copies each of their non-price proposal and price proposal in separate sealed envelopes. All envelopes must be clearly labeled as to their contents, whether Non-Price or Price Proposal.

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

Board of Assessors, Town of Sterling
One Park Street
Sterling, MA 01564

ATTN: Ms. Dreyer, Assessor’s Office

Non-Price Proposals shall be in a separate sealed envelope marked “Non-Price Proposals & Property Tax Administration Service” and shall include:

SCOPE OF SERVICES:

- a) Identification of Lead Person and all additional persons who will be working in Sterling
- b) Proposed number of hours and schedule available per week for each individual
- c) Resume` for each individual, who would be responsible for servicing the municipality.
- d) Conduct 350 periodic inspections annually to validate assessment data,
- e) Prepare or oversee the preparation of all Department of Revenue (DOR) reports, surveys, and data submittals including the annual tax recapitulation,
- f) Conduct an annual assessment-to-sale ratio study in order to determine the level and uniformity of standing assessments, and revise CAMA tables in order to keep assessments in compliance with DOR regulations,
- g) Be responsible for the successful completion of interim year and five year certification process,
- h) Insure that records of the office, including maps and CAMA system records are maintained and current,
- i) oversee the management and utilization of assessment related GIS resources,
- j) Interface with the public and provide assistance on valuation questions that cannot be addressed by in-house staff
- k) Review all real estate and personal property abatement requests, preparing recommendations to the Board of Assessors on suggested actions relative thereto,
- l) Prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the Towns expert on property tax valuation matters,
- m) Meet with the Board of Assessors once a month, or additionally at their request,
- n) Meet with other officers and Boards/Committees of the Town as needed in order to effectively coordinate and facilitate the Towns financial affairs,
- o) Review all land divisions and set up new real estate accounts,
- p) Prepare and obtain DOR approval of the annual new growth documents,

- q) Conduct the annual tax classification hearing,
- r) Assist the Town in such other capacities as the Board of Assessors may approve, ie PILOT agreements, etc.
- s) List all new construction relating to issued building permits, such activity to include data entry and addition of digital photos
- t) Administer personal property assessments including the processing of Forms of List & conduct field audits
- u) Recap – prepare and submit. Coordinate with DOR. Complete 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 of the recap
- v) Demonstrate considerable experience in the use of Geographic Information Services (GIS)

Criteria for review

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 proposal that receives the largest number of most advantageous ratings will be considered the successful proposal. Any proposal that receives a non-advantageous rating in any of the following criteria will not be considered for further review by the Town.

1. Massachusetts business/resident:
 - Non advantageous – Lives or business office outside of Massachusetts
 - Advantageous – Lives or business office within 60 miles from Sterling, whichever is closer
 - Most advantageous – Lives or business office within 30 miles from Sterling, whichever is closer
2. Experience in Massachusetts as an Assessor/Principal Assessor:
 - Non advantageous – Less than or 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 with Vision Appraisal Systems
 - Advantageous – At least 5 years working with CAMA systems with some experience working with Vision Appraisal Systems
 - Most advantageous – At least 10 years working with a CAMA system with some experience with Vision Appraisal Systems
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. Continuing Education criteria:
- Non advantageous – Less than three courses offered by either the MAAO or the IAAO.
 - Advantageous – Three to six courses and hold certificates for each either from MAAO or IAAO.
 - Most advantageous – Seven or more courses and hold certificates for each either from MAAO or IAAO.
7. 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.
8. 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.

9. Demonstrate knowledge and experience in administrating Personal Property

- Non advantageous - One to three years
- Advantageous – Four to seven years.
- Most advantageous – Over seven years experience.

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 non-price 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 three year period commencing July 1, 2018 and ending June 30, 2021. Annual compensation increases should be addressed in the price proposal. Proposal should provide a 4th year contract extension possibility and cost figure, such extension to be approved by vote of the Board of Assessors.

References

The proposer should provide contact information for municipalities previously/currently servicing in a similar contract environment.