

TOWN OF MOREAU
REQUEST FOR PROPOSAL FOR ASSESSMENT SUPPORT SERVICES
2019

1. Purpose

The Town of Moreau is soliciting sealed proposals from qualified firms (Contractor) to provide professional assessment support and valuation services for the Town of Moreau and as outlined in the SCOPE OF SERVICES section of this request.

2. Background

The Town of Moreau has approximately 6,200 parcels including 4,700 residential parcels, 955 vacant land and farm parcels with the balance of 545 commercial parcels.

The Town conducted a town-wide reassessment project in 2010.

The Town is interested in hiring a professional appraisal and consulting firm to assist the Assessor with various assessment and valuation tasks to continue to maintain 100% full value measurement.

3. Scope of Services

The Contractor will agree to perform the following assessment support and valuation services as directed by the Town:

1. Assist with processing building permits. Tasks include:
 - a. Property inspections
 - b. Measure and list improvements
 - c. Review all property inventory data for accuracy
 - d. Digitally Sketch new improvement, update existing sketch or create new sketch using APEX software, attach image to RPS and provide Town with the APEX sketch.
 - e. Capture digital photographs and attach to RPS.
 - f. Provide a new valuation assessment based on the new improvements.
 - g. Update data to RPSV4

2. Statistical Analysis to determine inequities and provide recommendations for valuation changes.

3. Review Commercial Real Estate Trends and analyze the trends with current commercial values. Provide recommendations for possible changes to current commercial assessed values.

4. Review land tables and provide recommendations for possible changes to land factors.
5. Update Residential Valuation Models and PIDS to reflect current valuation trends.
6. Valuation Reviews as needed
7. Review and Update Commercial Valuation Factor File and provide recommendations.
8. Assist assessor in reviewing informal reviews submitted and provide supporting documentation to assist in reviews.
9. Assist assessor in supporting documentation for BAR (Board of Assessment Review) challenges.
10. Provide assessment support for other assessment office duties as needed; exemption processing, clerical and administrative.
11. Commercial Valuation Consultation
12. Assist with public relations endeavors

4. Summary of Assessment Timeline

- Start date no later than April 10, 2019
- Mailing of New Assessments no later than May 1, 2019
- Informal assessment reviews: May 1 – May 15, 2019
- Completion of the assessment roll for filing of the Tentative Assessment Roll on May 1, 2019
- Board of Assessment Review meeting on the fourth Tuesday of May, 2019 or adjourned hearing date(s) yet to be determined
- Completion of the assessment roll for filing of the Final Assessment Roll on July 1, 2019.

5. Responsibility of Town /Assessor

Assessment Functions: all normal assessment functions including, but not limited to, timely updating of splits, combinations, posting of sales, any additional data entry not mentioned in this contract, clerical updating of RPS files.

Hardware/Software: the Town of Moreau Assessment Office will allow the use of its computer and access to the files on its network necessary to complete the updates and analysis or provide remote access to the Town's RPS file;

Miscellaneous Costs: All miscellaneous costs such as public relations materials, change of assessment notices, envelopes and postage, etc. will be the responsibility of the Town.

6. Term

It is intended that this agreement will be for the period April 10, 2019 – December 31, 2019.

7. Professional Liability Insurance

The Contractor shall, at its sole expense, acquire, continuously maintain during the period in which the Contractor is performing services, and provide the Town with acceptable proof of professional liability insurance coverage with an annual aggregate of not less than \$1,000,000 per occurrence, covering acts, errors, or omissions of a professional nature committed or alleged to be committed by the Contractor or any of its subcontractors as a part of its performance of professional services. The Contractor shall agree to maintain in full force and effect during the term of the contract Workers Compensation Insurance.

In addition, the Contractor agrees to indemnify and hold harmless the Town against all liabilities, claims and demands for personal injury or property damages or other expenses suffered or arising out of or caused by any negligent acts or omissions of the Contractor, its subcontractors, agents, or employees incurred in the performance of its services.

8. Compensation

The Town desires to enter into a professional services agreement. Unless otherwise agreed for a specific item, compensation for services rendered will be based on a fixed fee schedule. Proposal must indicate hourly rates and per permit rates for building permit maintenance. If any additional services request arise and are not included in this agreement, an addendum to the agreement will be required. All compensation payments will be made directly to the Contractor.

If the Contractor should subcontract any portion of the project, any additional cost or expenses incurred for said subcontractor(s) will be the responsibility of the Contractor or their subsidiaries.

Certiorari trial expert testimony shall be based on an hourly fee schedule.

The Contractor will be reimbursed by the Town in accordance with the terms for payment as they will appear in the service agreement contract. All requests for payment are to be submitted on the appropriate voucher to be provided by the Town.

9. Qualifications

Expertise of the firm shall be demonstrated by proof of past project successes providing similar services as described in Section 3. The proposals will be evaluated on knowledge, experience, and successes of these similar services. The selected firm shall follow ORPTS rule, procedures and guidelines and be capable of completing the valuation and assessment service.

Proposals must include the following qualification details:

1. The size of the firm;
2. The names and qualifications of the professional staff that will be managing the project, including, but not limited to, educational background, and detailed work experience;
3. Three references from municipalities of similar population. The references must include contact name, municipality name, address, telephone number, and email address;
4. Description of capabilities in working with RPS and statistical programs;
5. As indicated in the scope of services, if the selected firm subcontract(s) with any other individual(s) or firm(s) to complete any item(s) identified in the "Scope of Services," the qualifications of this individual(s) or firm(s) must be included in the proposal.

10. Conflicts of Interest

As part of your submission, please list any potential conflicts your firm might have due to work being done for outside parties. This should include, but not limited to, other work being done by your firm with others doing business in the Town of Moreau.

11. Selection Process

All submitted proposals will be reviewed by the Town, and will be evaluated with regards to qualifications and municipal experience. The Town may elect to interview select candidates in order to determine the firm which will provide the best services for the Town of Moreau. The Town reserves the right to negotiate terms with the selected respondent prior to entering into formal agreement. All firms who respond to the RFP will be notified of the results.

12. Rejection of Proposals

The Town reserves the right to reject any or all proposals, or to reject any proposal if the evidence submitted by, or investigation of such respondent fails to satisfy the Town that such respondent is properly qualified to carry out the obligations of the RFP and to complete the work contemplated therein. The Town reserves the right to waive any minor informality in the RFP. The Town reserves the right to request additional data or information regarding written proposals.

13. Questions

Inquiries may be directed to the Town Supervisor at Town Hall, 351 Reynold Road, Moreau, New York 12828; phone 518-792-1030 Ext. 6.

14. Proposal Requirements

1. Name, email and telephone number of person(s) to be contacted for further information.
2. A list of all personnel who will be involved with the support services, including their years of experience, qualifications, and proof of certification.
3. Listing of all projects completed during the past 3 years and those scheduled for the current year, including client names, telephone numbers, and sizes indicated by number of parcels and scope of services rendered.
4. If selected, the contractor will be required to provide proof of liability professional insurance and Workers Compensation Insurance, as stated above.

15. Proposal Submission Information

Submission Date and Time: By 3 p.m. on Friday, March 29, 2019.

Please submit 8 hard copies of all proposals, which includes one (1) original and seven (7) copies to:

Town of Moreau
Leeann McCabe
Town Clerk
351 Reynolds Road
Moreau, NY 12828

Clearly mark the submittal with the title “TOWN OF MOREAU ASSESSMENT SUPPORT SERVICES RFP” and the name of the responding firm. Only those RFP responses received prior to or on the submission date and time will be considered.

The Town will not accept proposals submitted electronically.