



Town of North Yarmouth
REQUEST FOR PROPOSAL
Tax Assessor Services

The Town of North Yarmouth is seeking proposals from qualified individuals or firms to provide property tax assessment services. Services include, but are not limited to the preparation and timely filing of assessment documents, abatement and supplemental tax assessments, yearly appraisals, market analysis, data entry, and consulting as necessary.

Proposals should be addressed to Town Manager, Town of North Yarmouth, 10 Village Square Road, North Yarmouth, Maine 04097 and marked "Tax Assessor Proposal." The proposal can be emailed to manager@northyarmouth.org; the subject line should read "Tax Assessor Services." **Bids will be accepted until 5:00 pm on Thursday, July 11, 2019.**

The Town of North Yarmouth reserves the right to reject any or all proposals.

SECTION I: GENERAL INFORMATION

A. Point of Contact

Town of North Yarmouth
Rosemary E. Roy, Town Manager
10 Village Square Road, North Yarmouth, ME 04097
manager@northyarmouth.org
Phone: (207) 829-3705 Ext. 207

B. Town Information

The Town of North Yarmouth has approximately 4,300 residents and is located in Cumberland County, Maine. There are approximately 1750 parcels with a taxable value of \$529,503,400 and approximately 155 personal property accounts with a taxable value of \$7,514,641. Town-wide taxable valuation of \$484,450,000; land area is 13,702.4 acres. Last property revaluation was performed in 2012. The Town of North Yarmouth's fiscal year is July 1st to June 30th.

C. Limits of Liability

The Town of North Yarmouth assumes no liability for any costs incurred by respondents or in responding to further requests for an interview, additional information, etc. before issuance of a contract.

D. Type of Contract

Contracted Tax Assessor shall be for a period of one (1) year beginning July 1, 2019, and ending June 30, 2020. *Note: The Town Charter describes the appointment as one year. An amendment to the Charter to increase this appointment to three (3) years is being considered by the Select Board.*

E. Questions

Questions about the Request for Proposal (RFP) shall be submitted electronically via email to Rosemary

Roy, Town Manager at manager@northyarmouth.org. In the subject line for the email, enter Tax Assessing Services. All submissions must contain the name of the person asking the question, address, phone number, and email address. Inquiry response(s) shall be distributed to all bidders.

F. Selection Process

The Select Board and Town Manager will review all proposals received based on the evaluation criteria outlined in **Section III - Evaluation Criteria**. Individuals or firms meeting the described standards will then be contacted for an interview. Following the interview process, a decision on the result of the RFP will be determined. The final contract shall be approved by the Select Board at a regular business meeting. The agreement will commence only upon the completion of required approvals, verification of requirements, and signatures by appropriate parties.

G. Conditions of Award

It is in the intent of the Town to award the contract to the most qualified and responsive individual or firm, provided that the proposal submitted meets the requirements of the RFP. The Select Board and Town Manager shall be the sole judge of the individual's or firm's qualifications and whether the proposal is in the best interest of the Town. Up to the time of signature of the contract, the Town shall have the right to reject any of the bids, to request and or negotiate re-bids, to waive any defects, time limits or deficiencies in any proposal, and to terminate consideration with or without cause if deemed in the best interest of the Town to do so.

H. Modifications to the RFP

The Town may revise this RFP by using written addenda. Addendums will be posted on the Town's website and emailed to all known bidders.

The Town may request additional information if deemed necessary. Failure to provide such data may result in the proposal being considered incomplete. The Town reserves the right to be the sole judge of all such criterion.

I. Insurance Certificates

The individual or firm must be able to provide evidence of the following insurance coverage.

1. In the capacity of an independent contractor, the individual or firm shall maintain insurance as described below for the entire term of the contract. The coverage shall protect it and the Town from any claims for personal injury, property damage, and claims under the Worker's Compensation Acts, including death arising out of the operation of this agreement.
2. A comprehensive general liability insurance policy with the following limits of coverage:
 - a. Bodily Injury: \$1,000,000 each occurrence
 - b. Property Damage: \$400,000 each occurrence
 - c. \$1,000,000 aggregate of all claims per occurrence
3. A comprehensive automobile insurance policy with the following limits:
 - a. Bodily Injury: \$1,000,000
 - b. Property Damage: \$500,000 per each occurrence
4. All of the insurance must be issued by an insurer licensed, authorized and maintaining an office to do business in Maine.

J. Confidentiality

Proposals will be kept confidential until after they have been evaluated. A record will be maintained of proposals received, but bids will **NOT** be opened publicly.

SECTION II: PROPOSAL SPECIFICATION

A. Bid Response Elements

The following information shall be provided in the proposal; respondents should give detailed information addressing each of the following areas:

1. Work History
2. Certifications
3. References
4. Any legal action relevant to the requested services that are pending or have been resolved within the past twenty-four (24) months
5. Annual costs to provide services outlined in the scope of services

Note: Failure to fully disclose requested information shall be grounds for disqualification. This section shall not be interpreted to require disclosure by State and Federal Statutes and court order.

The Town of North Yarmouth utilizes TRIO financial software, TRIO Real Estate, Personal Property, and Commercial software, in conjunction with Vision Appraisal Services. Each contractor must show evidence of familiarity with all systems by submitting a list of projects/contracts that require the use of these systems or the ability to adapt to the Town's software needs.

SECTION III: EVALUATION CRITERIA

A. Professional

1. Proof as Certified Maine Assessor (CMA)
2. General experience and technical competence
3. Approach to the Scope of Services - Section IV.
4. Value, detailed scope, time allowance, and cost of services that would maximize the benefit to the Town separately described in the following areas:
 - a. General Assessing Services
 - b. Real Estate
 - c. Personal Property
 - d. Property Equalization*
 - e. Annual Commitment
 - f. Record Maintenance
5. References - Minimum three (3)

* It is the Town's objective to implement an ongoing equalization plan to avoid future revaluations.

B. Comparative

1. Knowledge and experience with TRIO and Vision Appraisal software, or similar
2. Experience conducting a commercial/residential evaluation and equalization
3. Experience working with Municipal Officials and staff

4. Familiarity with Town of North Yarmouth and its assessed parcels

The contract awarded as a result of this RFP will be granted without discrimination by race, color, religion, age, sex, sexual orientation, political affiliation, or national origin.

SECTION IV: SCOPE OF SERVICES

A. General

1. The contracted Assessor(s) shall be responsible for the appraising and assessing of all tangible taxable and exempt real and personal property for taxation within the Town and for the administration and maintenance of all records necessary to sustain and preserve the Town's assessment program.
2. The contracted Assessor(s) shall provide specialized professional, administrative, and technical service that encompasses fieldwork in the review of existing and new properties, to include analytical and managerial services on an ongoing basis to maintain, equalize, and update properties values.
3. The contracted Assessor(s) is required to exercise considerable independent judgment in administering the assessment program within specific state laws and regulations (Title 36, M.R.S.A.), with general (non-assessing) guidance from the Town Manager.

B. Principal Responsibilities

1. Assessor(s) administers and maintains the assessment system for the Town in keeping current property valuation through visitation, data collection, and analysis.
2. Appraises residential, commercial, agricultural, and industrial properties; special rights and interests; personal property; and public utility equipment and properties.
3. Maintains and reviews property transfers, tax exemptions for taxes as permitted by the State, calculates valuations and all other related data, files State reporting forms as required; maintains the assessing database; and determines the assessments to be placed on new, renovated, and existing property based on changing market value.
4. Develops and administers a program for the collection of sales, costs, income, and other economic and social data affecting property values; prepares appraisal and other reports as necessary.
5. Shall maintain deed transfers and provide research as needed and provide state and local reports as required.
6. Provide assistance with Tax Increment Financing (TIF) and or Credit Enhancement Agreements (CEA) creations, amendments, and reporting.
7. Assist the Tax Collector with tax-acquired properties, special tax assessments, title research, etc.
8. Provide an annual report to the Select Board and the Town Manager of the overall activity and status of the Town's assessment, and to provide additional reports as may be requested.

C. Requirements

1. A thorough understanding of the principles, methods, and techniques of real and personal property assessments, including the provisions, ordinances, and general law in governing real and personal property assessment and statutory exemptions.

2. The ability to utilize statistical methods to analyze factors which may influence the value of the property, to exercise judgment in determining property values, and changes in Town structures and physical properties.
3. Considerable experience in property assessment work involving the appraisal and evaluation of land, buildings, and personal property.
4. The ability to plan and organize the maintenance of assessment and property records to facilitate the preparation of varied assessment roles and reports.
5. The ability to provide the annual tax assessment to the Tax Collector for a commitment by no later than August 10th of each year.
6. Possess effective working relationships with taxpayers, the general public, employees, and other representative departments or agencies.
7. Knowledge of building construction methods and architecture, municipal planning and real estate laws, municipal zoning and tax policy, and the mechanics of real estate sale and finance.
8. Works on a regular basis with the Code Enforcement Office to gather and maintain new and existing property construction, and to update and maintain all Town property maps and lot delineations.
9. Considerable knowledge of the geographic layout of the Town to conduct proper inspections and provide appropriate inventory as outlined by the statute.
10. Proof and maintenance of liability and vehicle insurance for the term of this agreement.
11. Proof of Certified Maine Assessor's license must be provided.

D. Expenses

Provide a statement with descriptions of the rate for services based on the criteria contained in this proposal, to include but not limited to:

1. Number of days per contract year (July 1-June 30) to perform services
2. Onsite services
3. Taxpayer services
4. Availability
5. Preparation and completion of annual tax commitment
6. Any other related requirements

E. Other Expenses

1. The Town of North Yarmouth will provide office space, computer, internet/network connection, printer/copier/fax, desk, phone, and other standard office supplies.
2. Vehicle(s) to complete described work shall be the responsibility of the individual and or firm and not that of the Town of North Yarmouth.
3. The town will provide staff assistance to the Assessor(s) which includes assisting residents when the assessor is not present and administrative clerical support consistent with assessing operations.
4. The Town will provide funds and or services for necessary map updating.