

REQUEST FOR QUALIFICATIONS

ASSESSING SERVICES FOR THE CITY OF SOUTH HAVEN

INTRODUCTION

The City of South Haven seeks statements of qualifications and management proposals from interested certified assessors to provide assessing services for a municipal corporation. From the submitted statements of qualifications and management proposals, the City may select one or more proponents for interview and may enter into an agreement with a selected proponent.

The City of South Haven is located in Allegan and Van Buren Counties, Michigan, with a 2010 census population of 4,403. Its 2014 Assessment Roll included 5,202 parcels. This total includes 4,912 Ad Valorem parcels, 49 IFT parcels and three DNR PILT parcels. Seventeen Ad Valorem parcels are located in Allegan County. The remaining parcels are located in Van Buren County. The current SEV of the City of South Haven is \$473,011,700.

The City reserves the right, in its absolute discretion, to reject any or all proposals, to waive irregularities, informalities and/or non-conformities in any submission, to select the proponent and proposal deemed to be in the best interests of the City, and to negotiate with the selected proponent(s).

Scope of Services

- Proponent must possess and maintain level III certification or higher.
- Proponent must possess and maintain a Personal Property Examiners Certification
- Proponent must possess and maintain proficiency in BS&A/Equalizer.net software.
- Minimum of six (6) business working hours in the South Haven Assessor's office per week based on a mutually agreed upon schedule. The City will provide clerical staffing in the assessing office for 40 hours per week.
- Plans, supervises, and participates in the appraisal and assessment of all real and personal properties in the City in accordance with state law and the City Charter.
- Perform onsite inspections in order to determine the value of any new construction.
- Maintains all of the City's assessment rolls, including ad valorem, specific tax rolls (IFTs, OPRAs, PILTs, TIFs, etc.), and special assessments in order to ensure compliance with state law and the City Charter. Keep the property record field cards up-to-date.
- In consultation with the City's Zoning Administrator, perform land division and combinations as necessary, complying with the State's Land Division Act and County procedures for land divisions. Processes splits and combinations to allocate taxable values.
- Analyze property sales of all property classes within the City to determine property values and appropriate assessment adjustments, including vacant land values.
- Process all Personal Residence Exemptions (PREs), rescissions, and Property Transfer Affidavits and Transfer Deeds.
- Process all poverty exemption and disabled veteran exemption applications.
- Files all necessary State and County reports pertaining to the Assessment and Tax Rolls.
- Maintain complete Apex land and building footprint sketches for all real properties in the City.

- Update the City’s Assessing Department personnel with pertinent information on all name and address changes made to the database(s).
- Maintain the link between assessment and building department databases to ensure (1) that the assessor can identify and assess all construction activity for which a building permit has been issued; and (2) that the Building Department’s database is up-to-date.
- Maintain parcel and tax maps, including any future GIS component to this.
- Process Personal Property Statements, including conducting an annual inspection to ensure an up-to-date list of personal property.
- Meet with taxpayers regarding assessment determinations and to explain appeal procedures.
- Respond to complaints.
- Acts as the City’s liaison in communicating with the public, media, and other governmental agencies on assessing issues.
- Provide assessment information to the public similar to how the City currently provides this information on its website.
- Represent the City in defense of existing and future assessment appeals to the Board of Review, the Small Claims division of the Michigan Tax Tribunal, and the full Michigan Tax Tribunal.
- Coordinate with the City’s attorney in the defense of these appeals.
- Prepare changes to the roll based on decisions of the Board of Review and/or Michigan Tax Tribunal. There are currently five properties under appeal before the MTT.

Interested individuals, firms or entities with experience and proper certification by the State of Michigan are encouraged to respond to this Request for Qualifications and Management Proposals.

SUBMISSION REQUIREMENTS

The City is asking respondents for professional qualifications and proposals. The City intends, using the process described below, to select a firm or individual and may enter into an Assessor Services Agreement with the selected proponent. Following the receipt of proposed qualifications and proposals, the City may select one or more proponents for interviews and selection.

Respondents must submit the following documentation, which will serve as the **Statement of Qualifications and Proposal**.

1. The proponent’s name, address, contact person(s) (including the title(s) of such person(s)), telephone contact numbers, facsimile number, and e-mail address.
2. A general description of the proponent’s current and past experience in the field of assessing.
3. A description of the scope and nature of municipal assessing experience. Provide a listing of all municipal assessing employment or contracting over the past five years with the following information: name and location of jurisdiction; team members, corporate and individual, actually involved in assessing activities; and name, address and telephone of reference contact for the municipality.
4. Names and resumes of key personnel who will constitute the team working for the City of South Haven.
5. A management proposal including certain information. The following is a brief

listing of some of the issues to be addressed in the management proposal.

- a. A detailed proposal outlining the proposed fee structure for the services to be provided.
- b. An annual calendar indicating the timeline of key tasks and deadlines for those tasks to be performed by the proponent.
- c. A description of customer service tasks to be performed and a description of time which will be spent in the office available to the public for customer service.
- d. The selected proponent will, at no further cost to the City, obtain all certifications, licenses, insurance, corporate authorizations and any approvals from federal, state, county and City agencies as may be required for the project. The selected proponent will verify that it is not in default to the City, and will not come into default at any time during the term of the management agreement. The proposal shall comply with, and be approved in accordance with, the City's purchasing policy.

The required submission of the **statement of qualifications and proposal** must be submitted in an 8.5 x 11 format. Respondents must submit an original, clearly marked and containing original signatures, along with **4 copies by 4:00 p.m. (local time), May 12, 2014**, without exception, at the following address, to be deemed responsive and eligible for consideration:

Deborah Lull
City of South Haven
539 Phoenix Street
South Haven, Michigan 49090

To assure that the respondent's submittal arrives at the proper place, on time, and to prevent opening by unauthorized individuals, submissions must be clearly identified on the outside, as follows:

Assessing Services RFQ

Faxed or electronic submissions will not be accepted. Once received, submissions will not be returned. Formal communication, such as requests for clarification and/or information concerning this solicitation shall be submitted to Deborah Lull, via fax to (269) 637-5319, via email addressed to dlull@south-haven.com, or by mail to Deborah Lull, 539 Phoenix Street, South Haven, MI 49090.

The anticipated schedule for this Request for Qualifications, selection of Respondent(s) and contract approval is as follows:

ACTIVITIES	DATE COMPLETE
RFQ Available	<u>April 11, 2014</u>
Submittals Due	<u>May 12, 2014</u>
Final Selection of Assessor	<u>May 19, 2014</u>

The City reserves the right to modify this timetable.

SELECTION PROCESS

An initial review process will be conducted by City officials to establish responsiveness of each submittal.

The Statements of Qualifications and Management Proposals will be evaluated through consideration of several factors. The review of all documents submitted will be in accordance with the following criteria:

- Experience and expertise in the municipal assessing services.
- Capability and experience of the members of the team; and, determination of availability of all required certifications necessary for performing the services.
- Past performance in municipal assessing services.
- Quality of the proposal in terms of clearly stating work to be performed and terms of payment.
- Ability to provide assessing services in accordance with state law, City policies and in full compliance with all applicable laws, ordinances and regulations.
- Other factors deemed relevant by those involved in the selection process.
- The City reserves the right, in its absolute discretion, to reject any or all proposals, to waive irregularities, informalities and/or non-conformities in any submission, to select the proponent and proposal deemed to be in the best interests of the City, and to negotiate with the selected proponent(s).

The above criteria will be used to evaluate the submittals. Following a review of the submittals, an Assessor will be selected to enter into a assessing services agreement immediately upon notification of selection, with service beginning on May 19, 2014.

If for any reason, a management agreement cannot be negotiated on a timely basis, the City will negotiate with other proponents.

The City reserves the right, in its absolute discretion, to reject any or all proposals, to waive irregularities, informalities and/or non-conformities in any submission, to select the proponent and proposal deemed to be in the best interests of the City, and to negotiate with the selected proponent(s).

- a. The respondent warrants that to the best of its knowledge and belief and except as otherwise disclosed it does not have any organizational conflict of interest. Conflict of interest is defined as a situation in which the nature of work under this solicitation and the

firm's organizational, financial, contractual or other interests are such that:

1. Respondent may have an unfair competitive advantage; or
 2. The respondent's objectivity in performing the work solicited may be impaired. In the event the respondent has an organizational conflict of interest as defined herein, the respondent shall disclose such conflict of interest fully in the proposal submission.
- b. The respondent agrees that if after award he, she or it, discovers an organizational conflict of interest with respect to this solicitation, he she or it, shall make an immediate and full disclosure in writing to the City Manager that shall include a description of the action which the respondent has taken or intends to take to eliminate or neutralize the conflict. The City may, however, disqualify the respondent or if a contract has been entered into with the respondent, terminate said contract, in its sole discretion.
- c. In the event the respondent was aware of an organizational conflict of interest before the award of a contract and intentionally did not disclose the conflict to the City Manager the City may disqualify the respondent.

INSURANCE

- a. Insurance. The proponent shall, upon entering into the assessing services agreement, obtain and maintain during the term of that agreement an insurance policy meeting the following requirements and shall provide to the City a certificate showing the premiums to be fully paid as well as a copy of the applicable policy, including all endorsements.
- General Liability Insurance in the amount of \$1,000,000 per occurrence and \$1,000,000 aggregate.
 - The City, including its officers and employees, shall be named as an additional insured on the policy.
 - The successful firm shall furnish to the City a certified copy of the policy or policies covering the work.
- b. Waiver. The selected proponent shall not hold the City of South Haven liable for any personal injury incurred by their respective employees, agents or consultant, contractors or subcontractors while serving as real property manager, the selected proponent agrees to hold the City harmless from and indemnify the City for such claim by its employees, agents, consultants, contractors or subcontractors, unless a court having jurisdiction finds there is gross negligence of an employee of the City while acting within the scope of their employment.

ADDITIONAL FACTORS

The successful firm shall be responsible for maintaining satisfactory standards of its employee's competence, conduct, courtesy, appearance, honesty, and integrity. It shall be responsible for taking such disciplinary action with respect to any of its employees as may be necessary.

The successful firm shall provide adequate competent supervision at all times during the performance of the contract. The firm or designated representative shall be readily available to meet with City personnel. The successful firm shall provide the telephone numbers where its representative(s) can be reached.

The firm shall provide such financial and programmatic information as required by the City to comply with all federal, state and local reporting requirements.

The firm agrees that it will abide by all applicable laws, rules and regulations and with the requirements of all grants and other governmental funding contracts governing equal opportunity and affirmative action.

CONTRACT DOCUMENTS

Written contract documents will be prepared or approved by the City. Modifications may be adopted based on final negotiations and specific requirements of the contract under this particular RFQ.