



REQUEST FOR PROPOSALS

TOWN OF JOHNSTON

The Town of Johnston is seeking proposals for **Tangible/Personal Property Tax Roll Maintenance**.

Any questions may be directed via email only to Joseph Chiodo, CPA, Finance Director at jchiodo@johnston-ri.us.

Bid Due Date:	December 10, 2012
Time	3:30pm
Place of Delivery	Town Clerk
	Johnston Town Hall 1385 Hartford Avenue Johnston, RI 02919

Bids must be received by the Town Clerk prior to the due date and time. Bids received after that time shall be returned unopened. Package must be sealed and clearly marked: “**Bid: Tangible/Personal Property Tax Roll Maintenance**”. The Town is not responsible for accepting any submissions delivered to other town buildings. Bids received prior to the time of opening will be securely kept, unopened until the opening time. No responsibility will attach to an officer or person for the premature opening of a bid not properly addressed and identified.

INSTRUCTION TO BIDDERS

TOWN OF JOHNSTON PURCHASING DEPARTMENT

RECEIPT AND OPENING OF BIDS

Sealed bids will be accepted in the Town Clerk's Office, Johnston Town Hall, 1385 Hartford Avenue, Johnston Rhode Island 02919, until the time indicated on the advertisement for bids and will then be opened and read in the Conference Room at the Town Hall.

FORM OF BID

Bids must contain the name and proper address of the bidding firm and must be signed by a responsible member of the firm with their signature and official title. Any exceptions to these specifications must be listed on a separate sheet.

SUBMISSION OF BIDS

- T. Envelopes containing bids must be sealed and addressed to the Town Clerk's Office, Johnston Town Hall, 1385 Hartford Avenue, Johnston, RI 02919 and must be marked with the name and address of the bidder, date and time of bid opening, and name of item in bid call.
- II. Any bidder may withdraw the firm's bid by written request at any time prior to the advertised time for opening. Telephonic, (fax or e-mail) bids, amendments, or withdrawals will not be accepted.
- III. Unless otherwise specified, no bid may be withdrawn for a period of sixty (60) days from the date and time of bid opening. Time is of the essence in this bid and failure to deliver within the time period shall be considered default.
- IV. If any proprietary, trade, brand or manufacturer's name or part number is used herein in describing the required equipment, it shall be understood to indicate the minimum standard of composition and quality desired, and shall not be construed to exclude equipment that equals or exceeds the functional capability and quality of the named equipment. If bids are based on such equivalent equipment, indicate the manufacturer's name, model and number for the equipment and include any literature or other explanation of the equipment's quality or performance.
- V. Negligence on the part of the bidder in preparing the bid confers no rights for the withdrawal of the bid after said bid has been opened.
- VI. Descriptive materials such as plans, drawings, photographs, written descriptions, and particularly manufacturer's literature that will enable the Town to determine the exact quality, design and appearance of the equipment proposed, shall accompany the bid. All equipment listed, or shown, in the manufacturer's literature, drawings or photographs, and

approved by the Town, shall be furnished.

- VII. All prices bid must be on the basis of F.O.B. Delivery Point the town of Johnston. Therefore, shipping costs are to be included within the process quoted. Deliveries must consist only of new merchandise or equipment and shall be made between 7:30am and 3:00pm, or as may be arranged during emergencies.
- VIII. Bids received prior to the time of opening will be securely kept, opened. No responsibility will attach to an officer or person for the premature opening of a bid not properly addressed and identified.
- IX. The Finance Director or his designate may waive any or all bids for cause, failure to meet specifications or any reason deemed appropriate.
- X. An award will be given in writing by to the bidder whose offer provides the greatest value to the Town, from the standpoint of meeting specifications and requirements of bidding documents, suitability to purpose, quality, service, previous experience, price, ability to deliver, or for any other reason deemed by the Town to be in its own best interest. Any final analysis or weighted point score does not imply that one bidder is superior to another, but simply, in our judgment the bidder selected appears to offer the best overall solution for our current and anticipated needs. Thus, the result will not be determined by price alone.

Award will be based on, but not limited necessarily to the following (where applicable):

- 1. Adherence to all conditions and requirements of the bid specifications;
 - 2. Total bid price; (including any discounts), unit bid price, or extended price;
 - 3. General reputation and experience of bidders;
 - 4. Evaluation of the bidder's ability to service the Town;
 - 5. Financial responsibility of the bidder;
 - 6. Prior knowledge of and experience with the bidder in terms of past performance;
 - 7. Needs and requirements of the Town; Experience with the products involved;
 - 8. Bidder's ability to meet delivery and stocking requirements;
 - 9. Delivery date or service date;
 - 10. Ordering method.
- XI. After the bid is awarded, all documents pertaining to the successful bid will be available for public inspection in the purchasing office.
 - XII. If all bids exceed the available funds, the finance Director may re-solicit new bids or enter into negotiations with two or more of the lowest bidders meeting all requirements as outlined.
 - XIII. A reasonable inquiry to determine the responsibility of the bidder or offer may be conducted. Failure to promptly supply information related to such an inquiry may be

grounds for disqualification of a bidder. All information supplied is confidential.

- XIV. The Town may make such investigations as it deems necessary to determine the ability of the bidder to provide the materials or services, and the bidder shall furnish to the Town all such information and data for this purpose as the Town may request. The Town reserves the right to reject any bid of the evidence submitted by, or investigation of such bidder fails to satisfy the Town that such bidder is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.
- XV. Bid price shall be firm; unit price shall include any and all trade discounts. Price shall be inclusive of any freight, handling, delivery surcharges or any other incidental charges. Your bid shall be exclusive of any Federal or State taxes, as the Town of Johnston is exempt from payment of such taxes. A certificate of exemption shall be forwarded to the elected vendor upon request.
- XVI. Delivery shall be made to the Town of Johnston as on the ship to address of the Purchase Order. Delivery is required within the time stated herein from the date of the issuance of the purchase order, unless otherwise noted. Delivery shall include assembly, servicing and placement of equipment in operable status unless specified otherwise. No deliveries shall become due or acceptable without a written Purchase Order issued by the Town of Johnston.
- XVII. The Department Director, or his designee, shall accomplish inspection and acceptance of materials/equipment purchased for the department.
- XVIII. In case of default, the Town may procure the materials from other sources and hold the bidder responsible for any excess costs occasioned thereby and may immediately cancel the Purchase Order.
- XIX. Bidders are advised that this section of the specifications will be evaluated before the technical specifications. Bids that do not comply with our General Conditions, Bonding, Insurance, Delivery, Bidder Qualifications, Service and Warranty requirements will be immediately deemed non-responsive and shall be immediately rejected without further review of the technical specification.
- XX. Bids not received by the Bid Submittal Deadline are late. Late bids will be returned to Bidders unopened.
- XXI. No employee, officer or agent of the Town of Johnston shall participate in the selection, the award or administration, of the contract if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when one of the following has a financial or other interest in any firm proposing on or selected for the award:

The employee or an officer or agent of the employee;
Any member of the employee's immediate family;
The employee's business partner; or
An organization that employs, or is about to employ, any of the above.

Documents Required for Submission with Sealed Bid

1. **Bid Bond**
Must be for 10% of the price of the proposal.

Documents Required if Selected as Winning Bidder

1. **Performance Bond**
Must be for 100% of completed cost of project/service.
2. **Insurance Binder**
Must provide a certificate of insurance indicating liability and workers' compensation coverage.

PROPOSAL SPECIFICATIONS

Tangible/Personal Property Tax Roll Maintenance

SCOPE OF SERVICES

- 1.0 Profile and other pertinent data regarding the Town of Johnston, Rhode Island:**
- 1.1 The Town of Johnston contains approximately 1,325 personal property accounts as of the December 31, 2011 Assessors Statement of Valuation Report.
- 1.2 All accounts as discussed above are to be valued in accordance with the provisions of this Request for Proposals.
- 1.3 The Assessors' Office utilizes the RRC Personal Property Appraisal Software on an in-house basis. Valuation and technical support relative to this system are the responsibility of the successful bidder.
- 1.4 Interested contractors must demonstrate experience on, and utilize this appraisal software for the generation of values.
- 2.0 Services to be performed:**
- 2.1 The Contractor will undertake a complete canvassing of all streets within the Town in order to identify new businesses as well as those which are no longer in operation.
- 2.2 The Contractor will list, code, data enter and value all new personal property accounts within the Town.
- 2.3 Relative to all existing accounts, the Contractor will maintain valuations for each account through the software relative to new and existing personal property items.
- 2.4 All declarations as filed with the Assessor's Office will be reviewed in order to extract any pertinent information relative to the personal property tax base for each particular account.
- 2.5 The Contractor must, relative to accounts which do not file a declaration, perform an on-site review of select accounts, where additions to their personal property tax base may be likely, due to the nature of their business.
- 2.6 The Contractor shall conform to the usage classifications of all personal property so described, in accordance with Rhode Island Law.

- 2.7 Any system changes required and updated pricing tables shall be the responsibility of the Contractor. The Contractor shall provide all necessary computer and appraisal consulting services to facilitate any system changes.

3.0 Responsibilities of the Town:

- 3.1 The Assessors' Office shall receive a status report from the Contractor. They shall review and evaluate the progress of the project, and notify the Contractor whether the work performed is satisfactory and timely.
- 3.2 The Town shall provide to the contractor adequate office space including desk, chairs, a telephone and a file cabinet for the duration of the project.
- 4.0 Responsibilities of the Contractor:
- 4.1 The contractor will identify owners, new and existing, of personal property located in the Town as of December 31, 2012.
- 4.2 All new accounts will be identified as either assessable or non assessable in accordance with the Laws of the State of Rhode Island. All personal property which is assessable will be listed at the site by the Company.
- 4.3 On all new personal property accounts, a complete and individual inventory listing will be made of all taxable personal property at each site. This listing must contain sufficient detail so that an independent off site value determination may be made. If initially unsuccessful in gaining access, at least two call backs will be made with record made of the date and time of such visits. For each account of taxable personal property, the contractor will list, and provide the following information:
1. The owner's legal name
 2. Business name
 3. Business Address
 4. Tax Billing Address
 5. Type of Business
 6. Telephone number
 7. Type of Corporation (SIC Code)
 8. Tax Status Code
 9. Account number
 10. Date of on site inspection
 11. Name of contractor's representative who conducted the on site inspection
 12. Complete list of each inventory item which is assessable and taxable as personal property. Included by item shall be the appropriate coding for valuation purposes.
13. Valuation breakdown of accounts by the following categories:

- A. Inventory
- B. Furniture and Fixtures
- C. Machinery and equipment
- D. Underground utilities
- E. Other

4.4 All listings will be as of December 31, and shall reflect the status of all personal property as of that date.

4.5 The Company will be responsible for all data entry and report generation.

5.0 Public Information Program:

5.1 The assessor and the contractor shall cooperate in maintaining good public relations throughout the period of this project. The contractor must coordinate all activities necessary to promote public understanding, awareness and cooperation in conjunction with the entire project. The contractor must be prepared to conduct a public information program that addresses the scope and objective of the project. This program shall continue on a regular basis for the duration of the project.

5.2 All public information activities should emphasize the responsibilities of the various participants, the appraisal methodology employed, and the overall goals of the project.

6.0 Project Timetable:

6.1 The Contractor must submit a comprehensive work plan at a minimum addressing the components indicated below and containing the following information for each component: starting date, completion date, and contractor's staff assignments for each year of the contract. The components to be addressed are as follows:

- Project Start Up
- Software Support
- Street Review
- Declaration Review and Changes
- Data Collection
- Coding
- Data Entry
- Valuation Generation
- Assessor Review
- Project Completion

7.0 Project Staffing:

- 7.1 The Contractor must set forth the project staffing to be utilized on this project. At a minimum, the Contractor shall address the following levels:

Project Director
Coding Personnel
Personal Property Listers
Data Processing Interface

- 7.2 Each individual, their project duties, the number of work days each will spend on this project and on other projects in which the contractor will be concurrently involved must be broken down into the following categories:

Name
Title
Project Responsibilities
Man Hours This Project
Man Hours Other Projects

- 7.3 The qualifications of each individual set forth above will be provided to the Town by submitting full resumes, which must include prior work experience, dates, positions, responsibilities for each employer, education and professional affiliations.
- 7.4 Since the project staffing is such an integral part of this project, contractors must be prepared to contractually commit all individuals as submitted in their proposal, to this project. Any deviation from the proposed individuals and man hours will constitute a breach of agreement to any contractual agreement which may result from this Request for Proposals.
- 7.5 Should it become impossible for a contractually committed individual to complete his duties, for a reason such as termination of employment, any change will in the contractors staffing as outlined in the proposal will be subject to the approval of the Town. The Town shall notify the contractor within fifteen (15) business days of the acceptance or rejection of any such staff substitutions. Any substituted person must be of an experience level equal to or greater than the person being replaced.

MINIMUM EVALUATION CRITERIA

Contractors must meet all provisions of the criteria as set forth below in order to qualify for consideration in the Comparative Evaluation Criteria. Any contractor who does not satisfy this will be specifically rejected as non responsive. All contractors must submit all necessary client lists, resumes and other pertinent information in order to evidence levels of experience and competence, in answering all Minimum and Comparative Evaluation Criterion.

- (1) The Contractor must have a staff of at least 10 full time, non clerical individuals dedicated to providing revaluation services.
- (2) The Timetable, as proposed, must evidence project completion date on or before March 15, 2013.
- (3) The proposed Project Director must have at least ten years experience in a Project Director capacity relative to personal property.
- (4) The Contractor must evidence the successful completion of at least thirty (30) personal property projects containing at least 1000 accounts.

COMPARATIVE EVALUATION CRITERIA

Contractors who satisfy all provisions of the Minimum Evaluation Criteria as set forth herein will be evaluated by the measures as set forth below. All contractors eligible for rating through this section will be rated for each of the categories through the following distinctions:

- A) Unacceptable
- B) Non Advantageous
- C) Advantageous
- D) Highly Advantageous

(1) Contractors experience with other Personal Property programs.

- A) Unacceptable:
No personal property experience.
- B) Not Advantageous:
Less than twenty successful Personal Property revaluations.
- C) Advantageous:
More than twenty, but less than fifty successful Personal Property revaluations.
- D) Highly Advantageous:
Fifty or more successful Personal Property revaluations.

(2) Contractors ability to utilize existing data base and appraisal system. The Town utilizes the RRC Personal Property Software for Windows, of Real Estate Research Consultants, Inc. which resides in-house.

- A) Unacceptable:
No experience utilizing personal property software.
- B) Not Advantageous:
One successful revaluation utilizing personal property software.
- C) Advantageous
Ten or more successful revaluations utilizing the RRC Personal Property Software for Windows.
- D) Highly Advantageous :
At least thirty successful revaluations utilizing the RRC Personal Property Software for Windows.

(3) Qualifications and experience of staff to be assigned to this revaluation assignment.

- A) Unacceptable:
No revaluation appraisal experience.
- B) Not Advantageous:
Revaluation experience of some of the staff as a Senior Personal Property Appraiser.
- C) Advantageous:
Revaluation experience of all of the staff as a Senior Personal Property Appraiser.
- D) Highly Advantageous:
Revaluation experience of all of the staff as Senior Personal Property Appraiser, experience utilizing the RRC Personal Property Software for Windows, and personal property experience in the Town of Johnston.

(4) Qualification and experience of the Project Director.

- A) Unacceptable:
Less than five years experience in a Project Director or Project Supervisor capacity on Personal Property Projects.
- B) Not Advantageous:
More than five years experience in a Project Director or Project Supervisor capacity on Personal Property Projects and no supervisory experience in a community of 2,000 or more accounts.
- C) Advantageous:
More than ten years experience in a Project Director or Project Supervisor capacity on Personal Property Projects and supervisory experience in a 2,000 account community.
- D) Highly Advantageous:
More than ten years experience in a Personal Property Project Director capacity, Personal Property supervisory experience in a 3,000 account community, experience on the RRC Personal Property Software and personal property experience in the Town of Johnston.

(5) Experience of the Contractor

- A) Unacceptable:
Less than five years in providing Personal Property services.
- B) Not Advantageous:
More than five years but less than ten years experience in providing Personal Property appraisal services.
- C) Advantageous:
More than ten years experience in providing Personal Property services.
- D) Highly Advantageous :
At least twenty five years experience in providing Personal Property services.

(6) Best Proposal

Determination of best proposal will be that contractor who demonstrates the highest level of performance in question #1 through #5 of this section.

(7) Project Timetable

All contractors must demonstrate that they can complete this revaluation assignment by **March 1, 2013**.

Any proposal which reflects anything beyond this date will be unacceptable.

PRICE PROPOSAL PERSONAL PROPERTY

The form will be used by the Contractor as their Price Proposal. Contractors must fill out this form in its entirety and submit it as their Price Proposal.

Physical Review of the Town

Number of Days Required

X Price Per Day

= Cost for Phase

Listing and Valuation - New Accounts

Number of Accounts Anticipated

X Price Per Account

= Cost for Phase

Declaration Review and Analysis

Number of Declarations Anticipated

X Price Per Declaration

= Cost for Phase

TOTAL PROJECT COST

The Town of Johnston retains the right to renew this contract, on an annual basis, for the tax years of December 31, 2013 and 2014. The price to be utilized for each of these years will be the price as set forth above.

The undersigned agrees to furnish the Town of Johnston with the entire project as detailed in the Request for Proposals at the price as evidenced above:

Company _____

Authorized Signature _____

Name and Title _____

Date _____

In addition to addressing each item in the specifications, the contractor must submit as part of its proposal the following information:

1. A letter of transmittal signed by the individual authorized to negotiate for and contractually bind the contractor stating that the offer is effective for at least sixty (60) calendar days from the deadline for the submission on proposals.
2. A copy of financial statements for the contractor's most recent Fiscal Year and the Assessor reserves the right to request additional information relative to the contractor's financial stability.
3. A list of the municipalities for which the contractor has provided personal property services, the services provided, fiscal years and client contacts.
4. A list of municipalities for which the contractor is currently committed to provide personal property services, the services to be provided and client contacts.