

TOWN OF NEW SALEM, MA
Request for Proposals
For Property Tax Assessment Services

The Town of New Salem (hereafter “the town” or “New Salem”) is seeking resumes, sample contracts and price proposals from qualified firms to provide the town with property tax assessment services. Due to the technical nature of the services required under the proposed contract, the town has determined that this procurement is best served by using the RFP process under Massachusetts General Laws, Chapter 30B. Such a process will enable the town to evaluate the experience of the contractor and his or her ability to carry out the town’s mandate of fair and equitable taxation. Because property tax assessment 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 technical expertise and cost.

Proposals are due by 4:00 p.m. on Monday, May 6, 2024. Late proposals will not be accepted. Emailed or faxed proposals will not be accepted. The Town of New Salem is an Equal Opportunity/Affirmative Action Employer and encourages MBE/WBE firms to submit proposals. The town reserves the right to reject any or all proposals if deemed in the public’s best interest to do so.

For Further Information, Contact:
William Lafley, Board of Assessors
413-695-2730 phone
newsalemassessor@outlook.com

Property Tax Assessment Services Request for Proposals

The town of New Salem is requesting proposals from qualified consultants to provide the town with property tax assessment services. The Request for Proposal (RFP) process will enable the town to assign higher ratings to consultants who can demonstrate prior experience in providing similar services to other towns in the Commonwealth. Following receipt and review of the submitted proposals, interviews may be conducted prior to making the final selection.

All proposals shall at a minimum address the requirements which follow:

SCOPE OF SERVICES

Reporting to the Board of Assessors (“the board”), the selected firm will provide the following contractual services to the Town for fiscal years 2025, 2026, and 2027:

- a) provide comprehensive annual revaluation and DOR certification services; fiscal years 2025, 2026 and 2027 are interim adjustment years.
- b) prepare new growth revenue reports and obtain Department of Revenue certification of same;
- c) prepare for and appear at the annual tax classification hearing;
- d) interface with the Massachusetts Department of Revenue/Bureau of Accounts in securing tax rates for fiscal years 2025, 2026, and 2027, to include compiling tax recapitulation submissions and providing all assessment information;
- e) prepare the real estate and personal property billing files for the VADAR system, working with VADAR to insure the successful upload to the tax collection module;
- f) beginning in July 2024, make available to the town a qualified Associate Assessor to conduct the portions of the scope of duties typically handled by a Principal Assessor. Responsibilities include interacting with taxpayers, the Board of Assessors, its office staff, the Town Administrator, and various Town boards by providing assistance on matters of property valuation and taxation; inspect, review, and formulate recommendations on properties under abatement appeal; prepare reports for and interact with DOR; conduct sales verification and building permit inspections; assist with budget and Town meeting related tasks; set-up new tax accounts based on approved land divisions; conduct a comprehensive assessment-to-sale ratio study and various other analysis and field work associated with interim year valuation and quintennial recertification tasks;

- g) conduct inspections of all properties for which the town's building department has issued building permits.
- h) ensure that the records of the office, including maps and CAMA system records are maintained and current.
- i) prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the town's expert on property tax valuation matters.
- j) meet with the Board of Assessors monthly, or additionally at their request,
- k) meet with other financial officers of the town in order to effectively coordinate and facilitate the town's financial affairs;
- l) Conduct periodic inspections to meet DOR minimum inspectional guidelines.
- m) And, assist the Town in such other capacities as the Board of Assessors may approve.

The contracting firm will be responsible for all costs of employment including FICA, unemployment taxes, health insurance, retirement, training, and mileage.

MINIMUM QUALIFICATIONS

Proposers must be able to meet a set of minimum requirements in order to be considered "responsive" to the RFP, and therefore eligible for further rating based on the comparative evaluation criteria. If the proposer does not meet the minimum criteria, their proposal will be rejected without further review. The Town of New Salem reserves the right to reject any and all proposals if deemed in the best interest of the town. The Town's evaluators must answer YES or NO to each question below. The consensus evaluation for each question must be YES for the consultant to move to the next evaluation round.

New Salem seeks a firm with considerable tax assessment and administration experience to oversee the operations of the Assessors' office. All staff provided by the proposer must possess these minimum qualifications:

- a) have successfully completed the Massachusetts Department of Revenue Course 101 on property tax administration;
- b) supervising assessor will have at least ten years' experience as a principal assessor or equivalent within the Commonwealth of Massachusetts, and have worked simultaneously in two or more communities and demonstrated success in managing the affairs of multiple offices, hold a bachelor's degree in business administration, real estate, economics or similar field of study, successfully completed no less than 300 hours of specialized valuation and tax administration coursework through

either the International Association of Assessing Officers (IAAO) or the Massachusetts Association of Assessing Officers (MAAO);

- c) associate assessor will have at least two years' experience as a mass appraiser, hold a real estate appraisal license or certification, hold a bachelor's degree, and have successfully completed no less than 80 hours of specialized valuation and tax administration coursework through either the International Association of Assessing Officers (IAAO), or the Massachusetts Association of Assessing Officers (MAAO);
- d) demonstrate at minimum two years' experience plus two years town revaluations with the Vision-CAMA system.

EVALUATION CRITERIA

In accordance with MGL Chapter 30B, an evaluation rating system will be applied to each of the criteria listed below for comparative evaluation of those proposals deemed to meet the minimum qualifications above. In keeping with the state's standardized procurement process, each of the following criteria will be ranked by reviewers using one of these three standards: non-advantageous, advantageous and most advantageous. Any proposal that receives a non-advantageous rating in any of the following criteria will not be considered for further review by the town. Proposers will then be ranked by adding the consensus rankings for all the criteria and the committee will decide which proposers it will interview. The following criteria will be used by the town's Proposal Evaluator Committee (the Board of Assessors) in evaluating the proposals:

1. Massachusetts business/resident:
 - Non advantageous – Lives or business office outside of Massachusetts
 - Advantageous – Lives or business office within 50 miles from New Salem
 - Most advantageous – Lives or business office within 25 miles from New Salem
2. Experience in Massachusetts providing contract assessment services:
 - Non advantageous – Less than or equal to ten years
 - Advantageous – More than ten and less than fifteen years.
 - Most advantageous – Fifteen 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 the Vision-CAMA system
 - Advantageous – At least two years working with the Vision-CAMA systems

- Most advantageous – At least five years working with the Vision- CAMA system
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. 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.
7. 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.

COST EVALUATION

For those responsive proposals that remain in contention after the technical evaluation, cost will be evaluated for the competitiveness of the cost proposal, and appropriateness of proposed cost to the proposed level of effort. Between or among proposals rated technically equal, the town would select the lowest cost equally rated proposal. However, the town will not necessarily award the contract to the lowest qualified bidder and, with appropriate justification and rationale, may select a proposal with a higher cost.

PROPOSED CONTRACT

The proposal will include a signed contract (attached) with appropriate attachments covering all of the substantive issues addressed in this RFP. The successful bidder's technical and price proposals will become an addendum to the contract. **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 town reserves the right to incorporate additional attachments before final signing. The contract is for a period to extend from July 1, 2024 through June 30, 2027, and is subject to appropriation by the town.

REFERENCES

The proposer should provide as a part of his or her proposal three (3) references, at least two (2) being from a community served as an assessor.

CONTENTS OF PROPOSALS

The proposer must include a cover letter, signed by an individual authorized to bind the firm, partnership, joint venture, etc. and containing at a minimum:

- A commitment of staff to perform on the project as described in the proposal
- A certification that no conflict of interest exists

To facilitate review, each proposal, at a minimum, must be organized as follows:

1. Technical proposal's scope of services
2. Qualifications
3. References

4. Proposal Price - Must be provided in a separately sealed envelope; see below.

PROPOSAL PRICE

In a separately sealed envelope, the proposal should include the total dollar amount to perform this work with costs broken down by fiscal year 2025, 2026 and 2027, and by major task or activity using the Scope of Services section of this RFP.

SUBMISSION/PROPOSAL DUE DATE

Proposals are due to the town no later than 4:00 p.m. on Monday, May 6, 2024 by mail or hand delivery to:

New Salem Board of Assessors
24 S Main Street
New Salem, MA 01355

Proposals must be submitted in a sealed envelope or box clearly marked on the outside:

“New Salem Property Tax Assessment Services”

No emailed or faxed proposals will be accepted.

Three (3) hardcopies of the technical proposal shall be hand delivered or mailed to the Assessor’s Office and received by the due date.

As previously stated, proposal price must be submitted in a separately sealed envelope, which may be included within the package including the technical proposals, in a separately sealed envelope. Price proposals will be securely kept sealed and separate, and not disclosed to the selection panel (Board of Assessors) until it has completed evaluation of the proposed contracts.

- **Clarification** - Questions/requests for clarification will be accepted until 12:00 p.m. on Monday, May 6, 2024. They shall be directed to William Lafley, Chair Board of Assessors in a written format by email at newsalemassessor@outlook.com to all substantive questions will be put in writing and supplied to all parties who have received a copy of the RFP, either by fax, mail or email.
- **Revisions** – If the Assessors determine that it is necessary to change any part of this RFP or provide additional information or clarifications, an addendum will be issued and furnished to each prospective respondent who has received a copy of this RFP.
- **Withdrawal of Proposals** – Proposals may be withdrawn by written request up until the deadline for submission of proposals.
- **Late Proposals** – Late proposals will not be accepted.
- **Amendments to Proposals** – Proposals may be amended up until the deadline for submission of the proposals. Amendments must be submitted sealed and in writing, clearly stating the changes to the proposal.
- **Proposals are Firm Offers** - Proposals responding to this RFP are considered firm and may not be withdrawn after 4:00 p.m. on Monday, May 6, 2024. Proposed prices must be firm for 90 days from the date the proposal is due, and will be bound by a Contract for Professional Services thereafter.
- **Expenses** – All expenses associated with preparing and submitting proposals, including any interviews shall be the responsibility of the proposer.
- **Laws/Regulations** - The successful proposer shall comply with all federal, state and local laws and regulations pertaining to the performance of the contract.

- **Return of Proposal Materials** – One copy of the proposal must be retained by the town of Bolton; however additional copies of the proposal may be retrieved by proposers not selected for project after contract award.
- **Contract Award** – The responsive proposals will be reviewed in May, 2024, with the intent being to recommend to the Town Administrator the firm to award the Contract by early June, 2024.