



REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: 02-2017/02/T

PROPERTY ASSESSMENT SERVICES

TERMS OF REFERENCE

FEBRUARY 14, 2017

Section 1.0 - REQUEST

- 1.1 The Town of Drayton Valley (as may be referred to hereinafter as the “Town”) is requesting a detailed and comprehensive proposal from qualified individuals, individuals and/or businesses for the delivery of property assessments for the municipality.
- 1.2 The Town is seeking proposals to meet the minimum requirements for service delivery as outlined in this Request for Proposals. **Proponents are invited to provide alternative options or solutions to address the service need.**
- 1.3 General information is available from the Revenue Manager, Mairi Smith, Town of Drayton Valley, 5102-52nd Street, Drayton Valley, AB. Phone 780 514 2200.
- 1.4 **Submissions will be accepted at the Town Office until 4:30 p.m. local time, Thursday, March 16, 2017.**
- 1.5 Responses can be mailed to the Town of Drayton Valley, Box 6837, Drayton Valley, AB, T7A 1A1 or hand delivered to the Town of Drayton Valley Civic Centre, 5102-52nd Street, Drayton Valley, AB. The submission must be in a sealed envelope and clearly marked as:

**Request for Proposal
Assessment Services
Town of Drayton Valley Finance Department**

- 1.6 Submission inquiries are to be directed to:

Mairi Smith
Revenue Manager
Town of Drayton Valley
Phone: 780 514 2200
Email Address: revenuemanager@draytonvalley.ca

Section 2.0 - REQUIREMENTS

2.1 PURPOSE

The purpose of the RFP is to obtain assessment services as a part of the Town of Drayton Valley's property taxation process.

2.2 LOCATION

Property located within Drayton Valley, Alberta.

2.3 AVAILABLE INFORMATION:

The Town can supply the following information and materials:

- a. maps
- b. subdivision plans
- c. development and building permits
- d. assessment rolls from Serenic Software

2.4 MINIMUM PROPOSAL REQUIREMENTS

Each proposal must contain the following information:

- a. a description of the Proponent's services, including experience and financial viability;
- b. unit and hourly price quotations;
- c. documentation that the Proponent is an Accredited Municipal Assessor of Alberta or that the Proponent meets the credentials of the 'Qualifications of Assessor Regulation' as per the *Municipal Government Act*.
- d. an assessor profile including the full legal name, designated assessor contact information and head office location.
- e. references from municipalities serviced by the assessor that include the official contact, phone number and street address.
- f. list of vehicles and equipment used for property assessments, including their make, model, year of manufacture, physical and mechanical condition (may include photographs and applicable reports);
- g. and proof of liability and automobile insurance coverage; and
- h. property description, proof of ownership, inspection reports and photographs of property.

Section 3.0 - SCOPE OF WORK

3.1 The following services will be required in the performance of this Agreement in order to achieve the Town's objectives. Modifications to this scope of work will be considered.

a. PRIMARY FUNCTION

Work with the Revenue Manager and in cooperation with municipal employees, including the Finance department, with the goal to provide assessment services on a daily basis and to act as the Town's representative in the operation of the town office.

b. MAJOR RESPONSIBILITIES

- i. Serve as a liaison between the Town and residents on matters dealing with property assessments; including the management of assessment inquiries in regards to property taxation via phone calls or e-mail communication.
- ii. Provide an annual assessment open house after tax notices have been mailed, to provide property assessment information and to answer questions taxpayers may have.
- iii. Conduct on-site visitation within the Town of Drayton Valley by using a combination of prevention, education, and enforcement to promote a quality of life for the residents of Drayton Valley;
- iv. Provide and maintain comprehensive computer assisted mass appraisal (CAMA) software and all subsequent hardware, at the Proponent's sole cost to hold assessment records. Any data conversion is also at the Proponent's sole cost and the annual assessment transfer must be in a format compatible with the Town's software.
- v. Prepare assessments in accordance with the *Municipal Government Act* and its attendant regulations and adhere to any other policies or guidelines as issued from time to time from the Alberta Provincial Government. The Proponent must also provide assessment information as requested by the Minister of Municipal Affairs in compliance with the statutory reporting requirements prescribed in the *Municipal Government Act* and its attendant regulations.
- vi. Provide completed assessments to the Town in compliance with the statutory timelines prescribed in the *Municipal Government Act* and its attendant regulations.
- vii. Defend any assessment that is subject to an assessment complaint that must go before and Assessment Review Board and any assessment appeals before the Municipal Government Board in compliance with the statutory timelines established in the *Municipal Government Act*. Expert witnesses may be required at the Proponent's sole cost. Legal representation will be the responsibility of the Town.

- viii. Provide services on the basis of a 40 hour work week, including:
 - coordinating hours in order to adequately address the major responsibilities of the Agreement, as well as accommodating the needs of the town office;
 - recognizing that the hours of work may fluctuate from month to month and that schedules are to be adjusted, in cooperation with the Revenue Manager, to accommodate the demands of the town office while managing the number of hours worked;
 - maintaining a record of all hours worked and tasks accomplished, as required by the Revenue Manager; and
 - recognizing that additional hours may be required from time to time and shall be pre-arranged with the Revenue Manager.
- v. Report to the Town, through the Revenue Manager, on a regular basis, as determined by the Town.
- vi. If the Proponent elects to take a vacation, it is the Proponent's responsibility to ensure that the obligations under the Services Agreement are being met.

Section 4.0 - GENERAL INFORMATION

4.1 BUDGET

Include a rate proposal, with a firm upset limit for each component of the service to be provided.

4.2 AGREEMENT REQUIREMENTS

- a. The successful Proponent will enter into a contractual agreement (in the form of a Services Agreement) with the Town within fifteen (15) days after delivery of the Agreement to the successful Proponent by the Town.
- b. If the successful Proponent fails to execute and return the Agreement to the Town within fifteen (15) days, the Town may cease all discussions and have no obligation to the Proponent, and may, if it chooses to do so, award the Agreement to another Proponent, all without affecting any claim which the Town may have against the Proponent as a result thereof.
- c. The Request for Proposals and the completed Proposal Form(s) including the Price Quotation and proposed Service Schedule of the successful Proponent will become Schedules of the Services Agreement.
- d. The Services Agreement will be for a negotiated term with the Town, and, at the Town's discretion, for an additional term.
- e. The Services Agreement will include, but may not be limited to, the following:
 - i. the start-up date identified by the Proponent in the proposal, and accepted by the Town;
 - ii. the Proponent will be expected to provide assessment services for an average of 40 hours per week, subject to the provision that the Town will have the ability to amend the operation of the service for the following purposes:
 - to revise schedules; and
 - to operate evening or weekend service;which shall be in place of, or in addition to, the hours indicated within the successful Proponent's proposed schedule.
- f. The Town will provide the successful Proponent with registration forms, brochures and other Town-generated documents.
- g. The successful Proponent must provide the Town with a certificate from Workers Compensation acknowledging Workers Compensation coverage for himself/herself and his/her employees and a copy of his/her liability insurance with respect to his/her vehicle(s), including but not limited to recreational vehicles on site and maintenance equipment used for assessment services.

- h. The successful Proponent is required to have a valid Town of Drayton Valley Business License, as well as any necessary Development and/or Building Permits, prior to Agreement execution.

4.3 SUBMISSION OF PROPOSAL

- a. The Proponent shall submit four (4) copies of its Proposal with all accompanying schedules, appendices or addenda in a sealed envelope or package marked with the Proponent's name and the RFP title up to the Closing Time set out on the date and at the location shown on the title page of this RFP.
- b. Proposals received after the Closing Time or in locations other than the address indicated, will not be accepted and will be returned. The Town may elect to extend the Closing Time.
- c. Amendments to a Proposal may be submitted if delivered in writing prior to the Closing Time in a sealed envelope or package, marked with the Proponent's name and the RFP title.
- d. Proposals may be withdrawn by written notice only, provided such notice is received at the administration office of the Town prior to Closing Time.
- e. All costs associated with the preparation and submission of the Proposal, including any costs incurred by the Proponent after the Closing Time, will be borne solely by the Proponent.

4.4 CONFLICT OF INTEREST

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent, has any financial or personal relationship or affiliation with any elected official or employee of the Town or their immediate families which might in any way be seen by the municipalities to create a conflict.

4.5 EVALUATION OF PROPOSALS

- a. Proposals will be evaluated on the basis of the overall best value to the Town based on quality, service, price, and any other criteria set out herein including, but not limited to:
 - i. the Proponent's ability to meet the requirements, qualifications, and competencies set out herein;
 - ii. the Proponent's ability to deliver the services when and where required;
 - iii. financial offer;
 - iv. the Proponent's business and technical reputation and capabilities, experience and where applicable, the experience of its personnel, financial stability, track record, and references of current and former customers;

- v. quality of Proposal; and
 - vi. any other criteria set out in the RFP or otherwise reasonably considered relevant.
- b. The Town may elect to short list some of the Proponents and may require short listed Proponents to provide additional information or details, including making a presentation, supplying samples, demonstrations, and/or additional technical literature.
 - c. The Town may elect to enter into negotiations with the Proponent or with any other Proponents concurrently. In no event will the Town be required to offer any modified terms to any Proponent prior to entering into an Agreement, and the Town will not be liable to any Proponent as a result of such negotiations.
 - d. All sub-contractors of the Proponent will be subject to the same evaluation process. It is the responsibility of the Proponent to guarantee that all its sub-contractors will comply with all the requirements and terms and conditions set out herein.

4.6 EVALUATION CRITERIA

- a. Proposals will be evaluated for their adherence to, interpretation of and response to the issues as set out in this document. The following established criteria will be used:
 - i. Proponent organization and strength;
 - ii. expertise and experience related to similar or related services;
 - iii. presentation of proposed methodologies and processes to achieve goals;
 - iv. clear identification of services included;
 - v. identification of major issues, challenges and risks associated with the deliverables;
 - vi. demonstrated budget breakdowns for time and effort for each deliverable;
 - vii. consultant's innovation in its approach to the service, including any recommended alternatives, efficiencies and originality;
 - viii. proposal conveys the Proponent's intent in a clear and concise manner; and
 - ix. co-ordination of work with the Town.

4.7 ACCEPTANCE AND REJECTION OF PROPOSALS

- a. Notwithstanding any other provision in the Proposal documents, the Town has in its sole discretion, the unfettered right to:
 - i. accept any Proposal;
 - ii. reject any Proposal;
 - iii. reject all Proposals;
 - iv. accept a Proposal which is not the lowest priced Proposal;
 - v. accept a Proposal that deviates from the Requirements, Specifications or the conditions specified in this RFP;
 - vi. reject a Proposal even if it is the only Proposal received by the Town;
 - vii. accept all or any part of a Proposal; and
 - viii. split the Services between one or more Proponents.
- b. All Proposals shall be irrevocable and remain open for acceptance for at least one hundred and twenty (120) days after the Closing Time, whether or not another Proposal has been accepted.
- c. The Town is not under any obligation to award a Contract and may elect to terminate this RFP at any time.

4.8 PROPOSAL TIMELINE

The Timeline for the RFP process is as follows:

- a. RFP issued to vendors – February 14, 2017;
- b. RFP closes – March 16, 2017;
- c. Completion of evaluation process and award – April 26, 2017; and
- d. Signing of Services Agreement– April 27, 2017.

Section 5.0 - PROPOSAL FORM



**REQUEST FOR PROPOSAL SUBMISSION
PROPERTY ASSESSMENT SERVICES
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Proponent's Name: _____

Address _____

Mailing Address (if different from above) _____

Telephone: _____ Fax: _____

Key Contact Person: _____

Telephone (if different from above) _____

Email: _____

The undersigned Proponent, having carefully read and examined the RFP, including all sections, and having full knowledge of the requirements described herein, does offer to provide the goods and/or services in accordance with the requirements, terms and conditions set out in the RFP and in accordance with the pricing as described within.

Signature of Authorized Signatory

Date

Print Name and Title

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REQUIRED PROPOSAL DOCUMENTS

By initialing each item, the Proponent confirms it has completed and enclosed the following documentation in its Proposal, and has identified any deviations or items of non-compliance providing an explanation of where it does not comply.

Initial

- _____ 1. The Proponent's Alberta WCB registration number is _____. The Proponent warrants that it is in good standing as to all WCB assessments and requirements.

- _____ 2. The Proponent confirms that it will comply with all occupational health and safety requirements, policies and procedures of the Town and all statutory occupational health and safety requirements under, or in connection with the *Worker's Compensation Act*.

- _____ 3. Brief description of Proponent's company, purpose, and history of successes.

- _____ 4. Information on size of organization, number of service providers, and staff employed.

- _____ 5. Information on relevant experience performed during the last five (5) years.

- _____ 6. Indication of the number and size of other municipalities where like services have or are currently being provided.

- _____ 7. Identification of key personnel to be assigned to this Agreement, setting out their names, responsibilities, qualifications, and relevant experience.

- _____ 8. Submission of a detailed budget breaking down the fees for all the services, identifying the total all-inclusive fee which shall include any out of the pocket expenses for the provision of services for the agreement/contract period.

- _____ 9. Submission of a detailed list of any deviations and/or variations from the terms and conditions set out in this RFP and, if applicable, detail proposed amendments.