

**CITY OF UNALASKA
REQUESTS FOR PROPOSALS
ASSESSING SERVICES**

The City of Unalaska, Alaska (hereinafter "City") is requesting proposals from qualified Alaskan real estate appraisal firms to act as its contractual Assessor for a five-year term.

Unalaska is a First Class city and taxes both real and business personal property. The City has approximately 900 parcels of real property. The bulk of the assessment work for the approximately 200 business personal property tax accounts in the City is performed by the staff of the City Clerk's office; the role of the contract assessor with regards to business personal property is mainly limited to consulting, although the contract assessor may be called upon to examine and assess the personal property of businesses selected for audit. Tax records may be viewed between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, at Unalaska City Hall, 43 Raven Way, Unalaska. Additional information required may be obtained by contacting the City Clerk, P.O. Box 610, Unalaska, Alaska 99685.

City Contact: Cat Hazen, City Clerk
 Phone: (907) 581-1251
 Fax: (907) 581-1417
 Email: chazen@ci.unalaska.ak.us

Schedule and Submission of Proposals:

Proposal due date: August 26, 2015 4:00 pm, local prevailing time
Anticipated award date: September 1, 2015

All proposals, including any amendment or withdrawal, must be received at the address and by the time and date shown above. Any proposal, amendment, or withdrawal that has not been received by that time will not be considered.

The outside of the envelope or subject line of the email shall state "Proposal for Assessment Services" and shall be sent to the City Clerk's Office, City of Unalaska, P.O. Box 610, Unalaska, Alaska 99685, or emailed to chazen@ci.unalaska.ak.us. Proposers choosing to submit via email assume all risk that interruptions or outages affecting the City's internet service or email server may delay or prevent receipt of proposals.

I. Scope of Work:

Assess all taxable real property within the limits of the City in the name of the person by whom it is owned, at its full and true value (fair market value) as of January 1 of the tax year, according to Alaska Statutes 29.45.110 and Chapter 6.32 of the Unalaska Code of Ordinances, including real property of senior citizens and disabled veterans pursuant to AS 29.45.030(e), as well as preparing the assessment roll, reviewing protests filed by property owners, and representing the City before the Board of Equalization.

II. Proposer Qualifications:

Proposers must have a thorough knowledge of state laws, rules and regulations relating to property tax assessment in Alaska as well as experience in appraising property in Alaska.

Proposers must also be able to demonstrate a thorough knowledge of mass appraisal techniques, including computer assisted mass appraisal systems.

All assigned key professional staff must be properly registered / licensed to practice in the State of Alaska. Provide a list of the qualifications, experience and training, including relevant continuing professional education, of the specific staff to be assigned to this contract. Indicate how the quality of staff over the term of the agreement will be assured.

Proposers shall provide evidence of their expertise, experience, and other factors which should ensure the probable success of the contract, with emphasis on evidence that demonstrates knowledge of Unalaska or similar communities.

Proposers shall show they possess sufficient financial resources and personnel to ensure their ability to fully complete the contract.

Successful proposer shall provide proof of insurance as specified in Attachment A – Insurance Requirements for Professional Services.

If sub-contractors will be used, proposer should identify them and describe their qualifications and roles in the project. Such sub-contractors, and any consultants and firm specialists mentioned in response to this request for proposal can only be changed with the express prior written permission of the City, which retains the right to approve or reject replacements. All sub-contractors shall be required to comply with the insurance requirements identified above.

For Proposers that have been engaged as a Municipal Contract Assessor, provide a list of the most significant engagements (maximum – 5) performed in the last five years that are similar to the engagement described in this request for proposals. These engagements should be ranked on the basis of total staff hours. Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact.

For Proposers that have been engaged primarily as a staff Municipal Assessor, provide the equivalent response to the above paragraph, as appropriate.

III. Specific Project Tasks:

- a) The Contract Assessor shall establish the full and true value of all taxable real property located within the boundaries of the City to be assessed in the name of the person by whom it is owned on the first day of January each year of the contract.
- b) The Contract Assessor shall provide current assessments with new photographs and valuations for all new buildings constructed and assess all changes on existing properties.
- c) The Contract Assessor shall establish the full and true value of each possessory interest in properties and exempt entity leases to others on an annual basis.
- d) The Contract Assessor shall present a plan for updating property cards for each parcel in the City showing size, dimensions, construction materials, and other pertinent data as well as a minimum of one exterior photograph.

- e) The Contract Assessor shall provide updates to the assessment roll to the City Clerk's office no later than March 1st each year of the contract.
- f) The Contract Assessor shall represent the City at Board of Equalization hearings.
- g) The Contract Assessor shall conduct a sales ratio analysis (ratio between assessed values and sales prices) to ensure that current appraisals are within 90% to 110% of market value.
- h) The Contract Assessor shall keep the City Administration informed of sales ratio analyses or other information which may cause the assessor to make changes to local assessments that would raise or lower assessments greater than 5% in any one year.
- i) The Contract Assessor shall be accessible to City staff throughout the term of the contract for consultation.
- j) The Contract Assessor, after completion of the Board of Equalization hearings, shall assist the City Clerk in certifying the final assessment roll.
- k) The Contract Assessor must be accessible to the City staff throughout the tax year to assist with correcting problems that may arise out of the assessment work.
- l) The Contract Assessor shall prepare the Sales Ratio Report and otherwise assist the City Clerk in preparing the annual report for the State Assessor.
- m) The Contract Assessor shall provide the City Council with a report on the level of assessment.
- n) The Contract Assessor shall assist City staff in determining the advisability of transitioning to a computer assisted mass appraisal system, and shall be available for consultation on selection and implementation of CAMA system if needed.
- o) The Contract Assessor shall provide training, as needed, to the City Clerk and staff.
- p) All work, paperwork, valuation models, calibration schedules and any other item used to set values, are to become the property of the City.

IV. Complete Review:

The proposer shall provide a detailed plan for the reassessment of all real property within the City, including a timeline for accomplishing this task.

V. City Provided Services:

The City shall supply the assessor with the existing tax roll (including legal descriptions, maps, plats, building permit applications, ownership records, addresses, etc.), access to existing assessment cards (to be maintained by the City), and office space and a phone while working on site in Unalaska.

It will be the responsibility of the City to mail assessment notices and tax bills to property owners. It will be the responsibility of the City to ensure that those appealing assessments to the Board of Equalization do so on appropriate forms, and to validate properly filed appeals.

The City anticipates providing staff support to the Contract Assessor.

VI. Compensation:

Proposers shall express their fee for each tax year of this proposed contract in a fee schedule to include all labor, materials, transportation costs, meals, lodging, and Board of Equalization expenses. A final scope of work and not-to-exceed fee will be negotiated after the top-ranked firm has been tentatively selected. If the negotiations with top-ranked firm are not satisfactory to the City, the City reserves the right to terminate negotiations and commence negotiations with the second-ranked firm, and so on.

If it should become necessary for the City to request the Contract Assessor to render any additional services to either supplement the services requested in the RFP or to perform additional work as a result of the specific recommendations included in any report issued on this engagement, then such additional work shall be performed only if set forth in an addendum to the contract between the City and the firm.

VII. Incurred Costs:

The City is not liable for any costs incurred by the proposer prior to issuance of an approved contract. All costs incurred as a result of responding to this RFP are the sole responsibility of the proposer.

VIII. Additional Considerations:

During the evaluation process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarifications from proposers, or to allow corrections of errors or omissions.

IX. Evaluation of Proposals:

Proposals will be reviewed by a committee of three persons. Scoring will be based on the following criteria, with a maximum score of 100:

CRITERIA	POINTS AVAILABLE
Proposed Cost	40
Expertise and Experience in Similar Engagements	35
Adequacy of resources (financial and personnel)	15
References from clients	10
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TOTAL	100

For the cost element, the lowest cost proposal shall receive full points. All other proposals will receive point deductions based on the percentage that the proposal is higher than the lowest bid. The formula will be: lowest bid amount divided by bid amount, multiplied by points possible equals score (rounded to the nearest whole number).

X. Rejection of Proposals:

The City reserves the right to: 1) reject any or all proposals; 2) accept the proposal which in its judgment best suits the needs of the City; 3) waive any and all irregularities or informalities in any proposal.

ATTACHMENT A

INSURANCE REQUIREMENTS FOR PROFESSIONAL SERVICES

- A. During the term of the contract, the Contractor shall obtain and maintain in force the insurance coverage specified in these requirements. Such coverage shall be with an insurance company with an A.M. Best rating of A VII or better, or a company specifically approved by the City.
- B. The contractor shall carry and maintain throughout the life of this contract, at its own expense, insurance not less than the amounts and coverage herein specified, and the City of Unalaska, its employees and agents shall be named as additional insured under the insurance coverage so specified and where allowed, with respect to the performance of the work. There shall be no right of subrogation against the City or its agents performing work in connection with the work, and this waiver of subrogation shall be endorsed upon the policies. Insurance shall be placed with companies acceptable to the City of Unalaska; and these policies providing coverage thereunder shall contain provisions that no cancellation or material changes in the policy relative to this project shall become effective except upon 30 days prior *written* notice thereof to the City of Unalaska.
- C. Prior to commencement of the work, the contractor shall furnish certificates to the City of Unalaska, in duplicate, evidencing that the Insurance policy provisions required hereunder are in force. Acceptance by the City of Unalaska of deficient evidence does not constitute a waiver of contract requirements.
- D. The contractor shall furnish the City of Unalaska with certified copies of policies upon request. The minimum coverages and limits required are as follows:
 - 1. Workers' Compensation insurance in accordance with the statutory coverages required by the State of Alaska and Employers Liability insurance with limits not less than \$1,000,000 and, where applicable, insurance in compliance with any other statutory obligations, whether State or Federal, pertaining to the compensation of injured employees assigned to the work, including but not limited to Voluntary Compensation, Federal Longshoremen and Harbor Workers Act, Maritime and the Outer Continental Shelf's Land Act.
 - 2. Commercial General Liability with limits not less than \$1,000,000 per Occurrence and \$2,000,000 Aggregate for Bodily Injury and Property Damage, including coverage for Premises and Operations Liability, Products and Completed Operations Liability, Contractual Liability, Broad Form Property Damage Liability and Personal Injury Liability.

3. Commercial Automobile Liability on all owned, non-owned, hired and rented vehicles with limits of liability of not less than \$1,000,000 Combined Single Limit for Bodily Injury and Property Damage per each accident or loss.
 4. Umbrella/Excess Liability insurance coverage of not less than \$1,000,000 per occurrence and annual aggregate providing coverage in excess of General Liability, Auto Liability, and Employers Liability.
 5. If work involves use of aircraft, Aircraft Liability insurance covering all owned and non-owned aircraft with a per occurrence limit of not less than \$1,000,000.
 6. If work involves use of watercraft, Protection and Indemnity insurance with limits not less than \$1,000,000 per occurrence.
 7. Professional Liability insurance with limits of not less than \$1,000,000 per claim and \$1,000,000 aggregate, subject to a maximum deductible \$10,000 per claim. The City of Unalaska has the right to negotiate increase of deductibles subject to acceptable financial information of the policyholder.
- E. Any deductibles or self-insured retentions must be declared to and approved by the City. At the option of the City, either the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the City, its officers, officials, employees and volunteers; or the contractor shall provide a financial guarantee satisfactory to the City guaranteeing payment of losses and related investigations, claim administration and defense expense.
- F. All insurance policies as described above are required to be written on an "occurrence" basis. In the event occurrence coverage is not available, the contractor agrees to maintain "claims made" coverage for a minimum of two years after project completion.
- G. If the contractor employs second tier subcontractors to perform any work hereunder, the contractor agrees to require such subcontractors to obtain, carry, maintain, and keep in force during the time in which they are engaged in performing any work hereunder, policies of insurance which comply with the requirements as set forth in this section and to furnish copies thereof to the City of Unalaska. This requirement is applicable to subcontractors of any tier.