

CITY OF VALDEZ, ALASKA
REQUEST FOR PROPOSALS
FOR
PROFESSIONAL ASSESSMENT/APPRAISAL SERVICES
SEPTEMBER 1, 2000

212 CHENEGA AVENUE, PO BOX 307, VALDEZ, AK 99676

**CITY OF VALDEZ TAX ASSESSOR
REQUEST FOR PROPOSALS**

Proposals are being accepted by the City of Valdez for real property assessment/appraisal services for the tax years 2001, 2002, 2003, 2004 and 2005.

I. City Contact: Christine A. Sasse
Finance Director
Phone: (907) 835-4313 (220)
Fax: (907) 835-2992

II. Award Schedule:

	Provide 15 copies of Proposal
Proposal due date:	September 1, 2000, 4:30 p.m.
Award date:	October 16, 2000
Work commencement:	At any time upon signing contract

III. Basic contract Term:
A 5-year contract is contemplated, subject to the annual review and recommendation of the Finance Director, the satisfactory negotiation of terms (including a price acceptable to both the City of Valdez and the selected firm), the concurrence of the City of Valdez City Council and the annual availability of an appropriation.

IV. Company Qualifications:

A) An affirmative statement should be included that the firm and all assigned key professional staff are properly registered/licensed to practice in Alaska.

B) Bidders shall provide evidence of their expertise, experience, and other factors which should ensure the probable success of the contract.

C) Bidders shall show they possess sufficient financial resources and personnel to ensure continuing commitment to the contract.

D) Successful bidder shall provide proof of at least \$1 million in general liability, workers' compensation, and automobile liability insurance.

E) If sub-contractors will be used, bidder 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 of Valdez, which retains the right to approve or reject replacements.

F) Bidders shall submit a summary of recent municipal real estate appraisals performed, with special emphasis on mass appraisal vs. fee appraisal experience.

G) Bidders shall 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 proposal. 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.

V. Personnel Qualifications:

Provide as much information as possible regarding the number, qualifications, experience and training, including relevant continuing professional education, of the specific staff to be assigned to this engagement. Indicate how the quality of staff over the term of the agreement will be assured. Other assessor personnel may be changed at the discretion of the proposer provided that replacements have substantially the same or better qualifications or experience.

VI. Scope of Work:

Assess all taxable real and personal (vessels over 95 feet in length) property within the limits of the City of Valdez in the name of the person by whom it is owned, at its full and true value (fair market value) as of January 1st of the tax year, according to Alaska Statutes 29.45.110 and Chapter 3.12 of the Valdez City Code. (See Attachment A.) Include real property of senior citizens who are exempt under AS 29.45.0030(e), oil refinery and personal property (vessels over 95 feet in length).

Project Tasks:

- a) The assessor shall perform an on site exterior visit to each parcel to update any and all improvements to the property on the property tax card, along with taking a new photograph of the parcel.
- b) The assessor shall provide assessments on a new assessment card along with a photograph for any new construction during that assessment year.
- c) The assessor shall appraise the possessory (or leasehold) interest in properties any exempt entity leases to others. (Attachment B lists the city's leasehold properties.)
- d) The assessor shall deliver to the city a completed assessment roll of all taxable property before March 1st or other date as established by the city council, as outlined in Chapter 3.12 of the city Code. For the contract year 2001, the City is requiring this deadline to be February 1st.
- e) The assessor shall communicate openly and in a timely fashion with the proper City personnel and the public in the handling of all appeals to ensure the Board of Equalization has all available information to render its decisions. The assessor is expected to present a positive professional image in both dress and conduct while interfacing with city staff and the public, especially during the appeals process. All assessor personnel shall carry City of Valdez photo identification and authorization letter from the City to assure the public of their

identity and purpose of gaining access to private property. City to provide such for contract personnel.

- f) The assessor shall allow sufficient time to properly hear an appellant's appeal with an on-site personal interview and to communicate with all due respect to the appellant and in layman's terms. The assessor shall meet with the appellant at least one week prior to the Board of Equalization.
- g) The assessor shall justify appraisals and represent the City at all meetings of the Board of Equalization.
- h) The assessor shall conduct a sales ratio analysis (ratio between assessed values and sales prices) to ensure that current appraisals are within 5% of the legal level, which is between 95% and 105%.
- i) The assessor will not be responsible for assessing oil and gas properties subject to State assessment, under AS 43.56. However, assessor must be able to demonstrate a good understanding of the State of Alaska's appraisal procedures and techniques of oil and gas property in order to assist the City in reviewing potential appeals to the State assessments. Professional assistance rendered in appeal work will be considered outside the basic contract. The assessor will negotiate a fee for assistance with any oil and gas property appeals.
- j) The assessor will prepare the State's Annual Report on Assessment and Taxation on behalf of the City.
- k) The assessor is to 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.
- l) The assessor is encouraged to interface with the business community and media to provide greater clarity of the assessor's role in the property taxation process and communicate assessment scheduling.
- m) The 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.
- n) All bidders should acquaint themselves with Chapter 3.12 of the Valdez City Code, which deals with taxation procedures (see Attachment A). This Code section will be made a part of the assessor's contract.
- o) The assessor shall update market values on City owned land and public buildings. Information obtained shall be used for insurance purposes and to establish lease values. (See Attachment C.)

- p) The assessor shall review Community Purpose Exemption Applications by February 28th and grant or deny these requests according to 312.050 of the Valdez City Code. (See Attachment D.)
- q) The assessor shall keep the City Administration informed of their intent for all appeals that are settled prior to the Board of Equalization.
- r) The assessor shall determine the apportionment of personal property tax per Section 3.13.020 B of the Valdez City Code.
- s) Unless otherwise directed by the City, the assessor shall use the professional services of Pritchard & Abbott, Inc., of Fort Worth, Texas, in the area of refinery valuations.
- t) Unless otherwise directed by the City, the assessor shall use the professional services of Mr. Sydney P. Levine of Shipping Intelligence, Inc., of New York , New York in the valuing of vessels over 95 feet in length (i.e. tankers).

VII. Project Product:

Chief project product will be a certified final assessment roll delivered to City by June 1st of each assessment year.

Other Products:

- a) Possessory interest determination on city leases.
- b) Assistance with any appeals to State oil and gas property assessment.
- c) Sales ratio analysis.
- d) Assistance with State report on "Annual Report on Assessment and Taxation."
- e) Update evaluation of city buildings and vacant lands.
- f) Rulings on all Community Purpose Property Exemption applications.

VIII. City Provided Services:

The City Finance Department shall supply the assessor with the existing tax roll (includes legal descriptions, maps, plats, ownership records, addresses, etc.), access to existing assessment cards (to be maintained at the city of Valdez), and a conference room and phone while working on the City contract.

It will be the responsibility of the Finance Department to mail assessment notices and tax bills to property owners, and prepare newspaper notices as required by the city Code. It will be the responsibility of the City Clerk's office and the city Administration to ensure that those appealing

assessments to the Board of Equalization do so on appropriate forms, and to validate properly filed appeals. (See Appeal Form and Assessor's Review Form, Attachment E.)

IX. Staff Training Requirements:

Bidder should identify any training needs that may be required for city staff in the use of any technology, products or services the prospective assessor may employ for this project.

X. Time Frame, Milestones, and Completion Dates:

- A) Contract Award: October 16, 2000.
- B) Work Commences: At any time after signing contract.
- C) Assessment schedule approved by city: October 30.
- D) Submit written progress report at 25%, 50%, and 75% of completion.
- E) Review State Assessment of Oil Property with City officials: March 1st.
- F) Assessment Roll delivered: February 1st, (includes possessory interest, City owned property valued).
- G) Finance Department to mail Assessment notices by February 28th.
- H) Assessor meetings with appellants: Must be completed within two weeks following deadline for appeals to be filed with Board of Equalization. At this time the assessor must certify to the appellant, in writing on Assessor's Review Form (Attachment E, the assessment value that will be taken to the BOE, if agreement is not reached.)
- I) Assessor must provide results of assessor's decisions to City Clerk no later than 5:00 PM seven days prior to Board of Equalization.
- J) Attendance at Board of Equalization: Third Monday in May.
- K) Certification of Tax Roll: June 1.

XI. Compensation:

There is no expressed or implied obligation for the City of Valdez to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. Such costs should not be included in the proposal.

Bidders shall express their fee for each year of this proposed contract (2001, 2002, 2003, 2004, and 2005) in a not-to-exceed sum to include all labor, materials, transportation costs, meals, lodging, and Board of Equalization expenses. A desired payment schedule should be outlined in

the proposal. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm. The City will withhold final 10% of fee subject to delivery of certified tax roll.

In addition, a statement must be included in the bid stating the firm will accept reimbursement for travel, lodging and subsistence at the prevailing City of Valdez rates for its employees.

Costs for the experts/consultants on vessel valuations and/or refinery valuations to attend the Board of Equalization shall be paid by the City over and above the cost of the contract.

If it should become necessary for the City of Valdez to request the assessor to render any additional services to either supplement the services requested in this 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 of Valdez and the firm.

XII. Ownership of Work Products:

It should be understood that the successful bidder will be asked to sign an agreement which states that ownership of work products rests with the City. The assessor may not sell or offer for compensation in any manner the data or information obtained under the terms and conditions of this agreement without obtaining the written permission of the city. The proposal should address this issue.

XIII. Proposal Evaluation Procedures

An Assessor Selection Advisory Committee will be established to review and assess proposals according to the following system:

Criteria: Points

How well proposal communicates understanding of work	0- 100
Review of firm's qualifications with provided references	0- 40
Demonstrated experience in mass appraisal work	0- 50
Qualifications of personnel and available resources	0- 40
Cost of Project	0- 25
Company qualifications	0- 25
Experience with State assessments of oil property	0- 20
Financial resources of firm	0- 10

MAXIMUM POINTS 310

XIV. Additional Considerations:

The City of Valdez reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly

and specifically noted in the proposal submitted and confirmed in the contract between the City of Valdez and the firm selected.

During the evaluation process, the Selection Advisory Committee and the City of Valdez reserve 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.

Contract Assessors

Appraisal Company of Alaska
Michael Renfro
3940 Arctic Blvd., Suite 103
Anchorage, AK 99503

Horan and Corak
403 Lincoln Street
Sitka, AK 99835

Thomas P. King and Associates
Mike Thompson
8800 Glacier Highway
Juneau, AK 99801

Black-Smith & Richards
2602 Fairbanks Street
Anchorage, AK 99503

APPENDIX

ATTACHMENT A – Excerpt from Valdez City Code/Ordinance #99-17

ATTACHMENT B – City of Valdez Leasehold Properties

ATTACHMENT C – City Owned Land and Buildings

ATTACHMENT D – Community Purpose Exemption Application Form

ATTACHMENT E – Appeal Form and Assessor’s Review Form