

**TOWN OF OXFORD  
REQUEST FOR PROPOSALS TO PROVIDE  
PROPERTY VALUATION UPDATING SERVICES**

The Town of Oxford Massachusetts is seeking proposals from qualified firms to provide “Commercial and Industrial Property Valuation Updating Services” in support of the Assessors’ requirement to revalue all real property (residential, commercial and industrial) for fiscal year 2011.

The required services to be provided are to 1) conduct a valuation update of all commercial and industrial property parcels on the MS Govern software currently in use in Oxford on an in-house basis and 2) provide training for Oxford Assessor Office staff so that, at the end of the project, they will be knowledgeable in the development of the new valuations.

The minimum requirements for consideration are: the contractor must have a staff of at least ten (10) full-time, non-clerical individuals dedicated to providing revaluation services; the contractor must have staff members assigned to the project that have a working knowledge of the MS Govern valuation system; and the proposed Project Director must have at least twenty years experience in a Project Director or Project Supervisor capacity with a revaluation firm.

Although late submissions will not be accepted, the Town reserves the right to request additional information or clarification from proposers or to allow correction of errors or omissions.

The Town reserves the right to accept or reject any or all proposals and to make an award deemed to be in the best interests of the Town.

Proposals are to be submitted in conformance with proposal specifications in sealed envelopes clearly labeled and will be accepted until 2:30 pm on Tuesday April 20, 2010 in the Town Manager’s Office, 325 Main Street, Oxford, MA 01540. Proposal specifications are available from the Manager’s Office and any questions can be addressed to the Manager’s Office (508-987-6030).

Joseph M. Zeneski  
Town Manager

**REQUEST FOR PROPOSAL**  
**REVALUATION UPDATING PROGRAM**  
**FOR ALL COMMERCIAL AND INDUSTRIAL REAL PROPERTY IN**  
**THE TOWN OF OXFORD, MASSACHUSETTS**  
**AS OF REVALUATION DATE JANUARY 1, 2010**



## **SECTION #1 PROPOSAL REQUIREMENTS**

The Town of Oxford, Massachusetts acting through its Town Manager is accepting sealed proposals from all interested contractors for the valuation update of commercial and industrial real property values in the Town of Oxford for implementation in Fiscal Year 2011.

Sealed proposals will be received and registered in the Office of the Town Manager until 2:30 pm on Tuesday April 20, 2010.

The specific service to be provided is to conduct a valuation update of all commercial and industrial property parcels on the MS Govern software currently in use by the Town of Oxford on an in-house basis.

Contractors must be willing and able to address, and provide evidence of their ability to complete this valuation assignment in order to be deemed responsive.

The Town of Oxford reserves the right to reject any and all proposals or to waive any informality in the proposals, if it appears to be in the best interest of the Town.

Contractors shall submit separate price and technical proposals. The price proposal form that is attached hereto must be completely filled out, signed, and placed in an envelope labeled "PRICE PROPOSAL." The technical proposal which must, at the very least, address and comply with all minimum requirements set forth in this Request for Proposals in order to be considered responsive, must be signed, placed in a separate envelope and labeled "TECHNICAL PROPOSAL."

The envelopes containing the price proposal and the technical proposal must each be labeled "Property Valuation Updating Services" and marked with the contractor's name and submission date.

A bidder may correct, modify or withdraw a bid by sealed written notice clearly marked as a correction, modification or withdrawal and received in the Office of the Town Manager prior to the time and date set forth for proposal submission.

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 thirty (30) 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 Town 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 revaluation services, a description of the services provided, the fiscal years for which the services were provided, and client contacts.
4. Written assurances that the contractor has a complete knowledge and understanding of Department of Revenue certification requirements and that all work performed shall reflect those requirements.

## SECTION #2 SCOPE OF SERVICES

### 1.0 General Information

The Town of Oxford is required to complete a valuation update for Fiscal Year 2011, assessment date January 1, 2010. The contractor will value all commercial and industrial property as included in the following categories:

<u>Property Type</u>	<u>Parcel Count</u>
111-125	45
300-393	196
400-452	165
012-043	<u>76</u>
Total	482

The services to be provided relative to this project include, but are not limited to, the following:

- All valid arms length sales occurring over the three year scope of this assignment will be inspected and analyzed and all sales ratios and coefficient of dispersion's will be developed and documented by neighborhood, class, sales year and style.
- All income and expense information will be analyzed for commercial and industrial properties.
- A 100% field review of all new values will be conducted.
- All building base rate costs will be adjusted on all properties.
- New land values will be set by neighborhood with considerations for zoning on all properties.
- New market rates will be set and capitalization rates will be developed for commercial and industrial properties.
- The land residual analysis will be documented for DOR certification.
- All valuation updating work will meet the certification requirements of the Commissioner of Revenue.
- Relative to real property, the Town utilizes the MS Govern software on an in-house basis.
- Interested contractors must demonstrate that they are both willing and able to work within the scope of the MS Govern Software. Knowledge of this system must be demonstrated relative to this software package.

### 2.0 Services to be Performed

- 2.1. The Town of Oxford is required to complete a revaluation for Fiscal 2011, assessment date January 1, 2010.
- 2.2 Subject to the terms and conditions of this request for proposals, the contractor shall value all commercial and industrial properties in the Town of Oxford.

- 2.3 The contractor shall determine the full and fair cash value of all property and usage classification of all real property so described, in accordance with Massachusetts General Laws, Chapter 59.

### 3.0 Responsibilities of the Town

- 3.1 The Town shall receive a weekly status report from the contractor to review and evaluate the progress of the project. The Town shall notify the contractor whether the work performed is satisfactory and timely.
- 3.2 One set of most recent tax maps will be provided to the contractor. Additionally, one set of zoning by-laws will be provided.
- 3.3 The Town shall provide "parcel identification data" for each parcel of real property including the following items which are current to the most recent billing date: owner's name (s) and mailing address, property address, subdivision deed references and land area.
- 3.4 The municipality shall provide to the contractor adequate office space including desk, chairs, a telephone and a file cabinet for the duration of the project.
- 3.5 The municipality shall provide a copy of the LA-3 sales listing forms for calendar years 2008 and 2009.
- 3.6 All sales validity codes are the responsibility of the Town.
- 3.7 The Town will provide a computer terminal, with full access to the Govern software, for use by the contractor in the undertaking of this assignment.

### 4.0 Responsibilities of the Contractor

- 4.1 The contractor shall determine the full and fair cash value of each parcel of commercial and industrial property and its usage classification in accordance with Massachusetts General Laws, Chapter 59. The contractor will identify all property using the Department of Revenue's "Property Type Classification Codes".
- 4.2 All data will be field reviewed by the Company's supervisory personnel to insure the consistency and accuracy of this data.
- 4.3 All valid arms length sales occurring over the three year scope of this assignment will be inspected and analyzed and all sales ratios and coefficient of dispersion's will be developed and documented by neighborhood, class, sales year and style.
- 4.4 A 100% field review of all new values will be conducted.
- 4.5 Building base rate costs will be adjusted on all properties.
- 4.6 New land values will be set by neighborhood with considerations for zoning on commercial and industrial properties.
- 4.7 The land residual analysis will be documented for DOR certification.
- 4.8 All valuation updating work shall meet the certification requirements of the Commissioner of Revenue.

- 4.9 The design, development, generation, and processing of all reports and spreadsheets, as required by the Department of Revenue in their certification process, are the responsibility of the contractor.
- 4.10 All income and expense information will be analyzed for commercial and industrial properties.
- 4.11 The contractor will be responsible for performing all valuation activities in the Oxford Assessor's Office on a terminal provided specifically for this purpose.
- 4.12 All work shall be in compliance with Massachusetts Laws, whether of statutory or judicial origin. The contractor must agree to be bound by the legal interpretations of the Commissioner of Revenue.
- 4.13 The contractor will perform these services in a timely fashion and in a professional and satisfactory manner.
- 4.14 All valuation updating work shall meet the certification requirements of the Commissioner of Revenue.
- 4.15 Software Licensing  
Any licensing arrangements relative to the third party (the successful bidder) use of the software must be negotiated between the successful bidder and the respective provider of the particular software package:

Real Property – MS Govern Software

The Contractor will assume any and all costs associated with third party licensing.

- 4.16 Software Training  
As knowledge of the software is considered critical to the success of the revaluation at hand, the Town requires that all project personnel be fully trained relative to the use of the particular software, real or personal. It is the responsibility of the successful bidder to obtain training from the respective provider of the particular package:

Real Property – MS Govern Software

5.0 Sales Verification and Analyses

The contractor shall conduct a comprehensive sales analysis to determine both the level and the uniformity of existing assessments and to identify the source of any assessment inequities.

6.0 Public Information Program

The Town 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. The program shall continue on a regular basis for the duration of the project. All public information activities should emphasize the responsibilities of the various participants, the appraisal methodology employed, and the overall goals of the project.

## 7.0 Assessor's Office Staff Training

- 7.1 The contractor will be responsible for training local staff in such a manner that, at the end of the project, the Assessor's Office will be knowledgeable in the development of the new valuations.
- 7.2 The training must be conducted in accordance with a schedule convenient for the Assessor and staff.
- 7.3 The contractor shall provide the Assessor and staff with appropriate written training materials.
- 7.4 The contractor must describe in its proposal its plan for conducting such training and identifying separate types of training.

## 8.0 Valuation

### 8.1 Systems

The contractor will utilize the MS Govern Software in the undertaking of this assignment.

### 8.2 Market Approach

The contractor shall conduct an analysis and inspection of all valid arms length sales through December 31, 2009 for all commercial and industrial properties. The contractor will compare the assessed value to the sales price for each type of commercial and industrial property analyzed. Based on this analysis, the contractor shall establish appropriate trending multipliers to reflect current market value and shall provide a detailed analysis, of what factors (for example, neighborhood, parcel size, age, grade, condition, style, etc.) are affecting sales price and are the sources of assessment inequities. The report detailing the analysis and supporting the proposed trending multipliers shall be submitted to the assessors prior to the commencement of valuation field review activities.

### 8.3 Cost Approach

The contractor shall analyze local building costs and trends and shall develop and apply the appropriate base rates toward determination of the values of appropriate properties.

## 9.0 Defense of Values

The Contractor shall provide expert witnesses to represent the Town at all appeals to any Court, Appellate Tax Board, or otherwise, of valuation and/or classifications resulting from this project. The Town must approve these expert witnesses. A per diem rate is to be provided by the Contractor for any and all defense of value services to be provided.

## 10.0 Project Staffing

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  
Senior Appraiser  
Appraisers

- 10.1 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

- 10.2 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.
- 10.3 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.
- 10.4 Should it become impossible for a contractually committed individual to complete his duties, for a reason such as termination of employment, any change 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 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 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 Timetables, as proposed, must evidence a project completion date on or before August 31, 2010.
- (3) The proposed Project Director must have at least twenty years experience in a Project Director or Project Supervisor capacity with a revaluation firm.

## 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 revaluation programs in Massachusetts.
  - A) Unacceptable:  
No experience in Massachusetts.
  - B) Not Advantageous:  
Less than five successful revaluations in Massachusetts.
  - C) Advantageous:  
More than five, but less than ten successful revaluations in Massachusetts.
  - D) Highly Advantageous:  
Ten or more successful revaluations in Massachusetts.
  
- (2) Contractors ability to utilize existing database and appraisal system. The Town of Oxford utilizes the MS Govern Software.
  - A) Unacceptable:  
No experience utilizing any appraisal software.
  - B) Not Advantageous:  
Less than five successful revaluations using appraisal software.
  - C) Advantageous:  
More than five, but less than ten, successful revaluations using appraisal software.
  - D) Highly Advantageous:  
More than ten successful revaluations utilizing appraisal software, of which at least two were performed on the MS Govern Software. Also, the Company must demonstrate at least one successful revaluation project performed specifically for the Town of Oxford.
  
- (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 Senior Commercial and Industrial Appraiser or Commercial Appraiser.
  - C) Advantageous:  
Revaluation experience of all of the staff as Senior Commercial and Industrial

Appraiser or Commercial Appraiser.

- D) Highly Advantageous:  
Revaluation experience of all of the staff as Senior Commercial and Industrial Appraiser and experience on the Govern Software within the Town of Oxford.

(4) Qualification and experience of the Project Director

- A) Unacceptable:  
Less than five years experience in a Project Director or Project Supervisor capacity.
- B) Not Advantageous:  
More than five years experience in a Project Director or Project Supervisor capacity and no supervisory experience in a community the size of Oxford.
- C) Advantageous:  
More than five years experience in a Project Director or Project Supervisor capacity and supervisory experience in the Town of Oxford.
- D) Highly Advantageous:  
More than fifteen years experience in a Project Director capacity.

(5) Experience of the Contractor

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

(6) Best Price

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

(7) Project Timetable

All contractors must demonstrate that they can complete this revaluation assignment by August 31, 2010. Any proposal that reflects anything beyond this date will be rejected as unacceptable.

**PRICE PROPOSAL**

This form will be used by the Contractor as their Price Proposal, for the purposes of compliance with Chapter 30B of the Massachusetts General Laws. Contractors must fill out the form in its entirety and submit it in a separate envelope as their Price Proposal.

**Fixed Fee Price for Fiscal 2011 Commercial and Industrial Real Property Valuation Update**

In words: \_\_\_\_\_

In numbers: \$\_\_\_\_\_

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

Company \_\_\_\_\_

Authorized Signature \_\_\_\_\_

Name and Title \_\_\_\_\_

Date \_\_\_\_\_

**CERTIFICATE OF VOTE**

(to be filed if Contractor is a Corporation)

I, \_\_\_\_\_, hereby certify that I am the duly qualified  
(Secretary of the Corporation)

and acting Secretary of \_\_\_\_\_ and I further certify that a meeting  
(Name of Corporation)

of the Directors of said Company, duly called and held on \_\_\_\_\_, at which all the  
(Date of Meeting)

Directors were present and voting, the following vote was unanimously passed:

VOTED: To authorize and empower

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

any one acting singly, to execute Forms of General Bid, Contracts or Bonds on behalf of the Corporation.

I further certify that the above vote is still in effect and has not been changed or modified in any respect.

By: \_\_\_\_\_ (SEAL)  
(Secretary of Corporation)

A True Copy:

Attest: \_\_\_\_\_  
(Notary Public)

My Commission Expires: \_\_\_\_\_  
(Date)