



**TOWN OF WAREHAM**

**REQUEST FOR PROPOSALS FOR**

**A FY 2025 PERSONAL PROPERTY REVALUATION**

## SECTION #1

### PROPOSAL REQUIREMENTS

The Town of Wareham is accepting sealed proposals from all contractors interested in completing a revaluation of all personal property in the Town of Wareham for implementation in Fiscal Year 2025.

Sealed proposals shall be received in the Town Administrator's Office, 54 Marion Road, Wareham, MA 02571 until February 29, 2024 at 2:00 pm at which time and place the proposals will be opened.

Proposal submissions must be submitted in accordance with Chapter 30B of M.G.L. which requires TWO (2) sealed envelopes; one clearly marked "FY25 Personal Property Revaluation February 29, 2024, 2:00 pm – Non-Price Proposal." and the second clearly marked "FY25 Personal Property Revaluation February 29, 2024, 2:00 pm – Price Proposal." The Town of Wareham assumes no liability for proposals mistakenly opened due to improperly labeled envelopes and will return same to proposer without notice.

A copy of the specifications may be obtained on the Town's website, <https://www.wareham.ma.us/bids-rfps>, on Tuesday, January 16, 2024 at 12:00 pm or in the Town Administrators Office, 54 Marion Road, Wareham, MA 02571. The prospective bidder is responsible for checking to see if any addenda have been issued prior to submitting their bid. Any addenda will be posted on the Town's website and Commbuys. Any questions are to be submitted in writing to the Assessor's office, [assessor@wareham.ma.us](mailto:assessor@wareham.ma.us), no later than 4:00 PM February 15, 2024.

The Town of Wareham reserves the right to reject any or all proposals which are not responsible and/or responsive, in whole or in part, as deemed in the best interest of the Town, in accordance with M.G.L.

The Town of Wareham is an Equal Opportunity Employer. Proposals from Woman/Minority Business Enterprises are strongly encouraged.

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 Board of Assessors 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 contractually bind the contractor stating that the offer is effective for at least sixty (60) calendar days from the deadline for the submission on proposals.



2. A copy of financial statements for the contractor's most recent Fiscal Year. 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 personal property services, a general description of the specific services provided, fiscal years and client contacts.
4. A list of municipalities for which the contractor is currently committed to provide personal property services, the services being provided and client contacts.
5. Written assurances that the contractor has a complete knowledge and understanding of Department of Revenue (DOR) certification requirements and that all work performed shall reflect and comply with the DOR requirements.

## SECTION #2

### SCOPE OF SERVICES

#### **1.0 Profile and other pertinent data regarding the Town of Wareham, Massachusetts.**

**1.1** The Town of Wareham contains approximately 750 personal property accounts as of January 1, 2023.

**1.2** All accounts as discussed above are to be listed and collected in accordance with the provisions of this Request for Proposals.

**1.3** The Board of Assessors utilizes the RRC Personal Property Appraisal Software of Real Estate Research Consultants, Inc. on an in-house basis.

**1.4 Interested Contractors must utilize this appraisal software in an off-site location for the generation of values. Additionally, the successful bidder will be responsible for price researching and subsequent annual updating of all pricing tables within the software.**

#### **2.0 Services to be Performed**

**2.1** The Contractor will provide a complete revaluation of all personal property in the Town for Fiscal 2025, for the certification of the Department of Revenue.

**2.2** The Contractor shall conform to the usage classifications of all personal property so described, in accordance with Massachusetts General Laws, Chapter 59.

**2.3** Any system changes required and updated pricing tables shall be the responsibility of the Contractor. The Contractor shall provide all necessary computer and appraisal consulting services to facilitate any system changes.

#### **3.0 Responsibilities of the Town**

**3.1** The Board of Assessors shall receive a weekly status report from the Contractor. They shall review and evaluate the progress of the project, and if necessary or advisable notify the Contractor whether the work performed is or is not satisfactory and timely.

**3.2** The Town shall, as available, provide to the contractor adequate office space including desk, chairs, a telephone and a file cabinet for the duration of the project.

#### **4.0 Responsibilities of the Contractor**

**4.1** The contractor will identify owners of personal property located in the Town as of January 1, 2024.

**4.2** All accounts will be identified as either assessable or non-assessable in accordance with the General Laws of the Commonwealth of Massachusetts.

**4.3** On all personal property accounts that are new, as well as those chosen to be collected, a complete and individual inventory listing will be made of all taxable personal property at each site. This listing must contain sufficient detail so that an independent off-site value determination may be made. If initially unsuccessful in gaining access, at least two callbacks will be made with record made of the date and time of such visits. For each account of taxable personal property, the contractor will list, and provide the following information:

1. The owner's legal name
2. Business name
3. Business Address
4. Tax Billing Address
5. Type of Business
6. Telephone number
7. Type of Corporation (SIC Code)
8. Tax Status Code
9. Account number
10. Date of on-site inspection
11. Name of contractor's representative who conducted the on-site inspection
12. Complete list of each inventory item that is assessable and taxable as personal property. Included by item shall be the appropriate coding for valuation purposes.
13. Valuation breakdown of accounts by the following categories:
  - A. Inventory
  - B. Furniture and Fixtures
  - C. Machinery and equipment
  - D. Underground utilities
  - E. Other

**4.4** The Company shall verify and inspect all accounts taxable, non-taxable or exempt and shall state the reason for each account classified as either non-taxable or exempt. Non-taxable accounts shall be identified with NTV indicating inspection and no indicated value.

**4.5** All listings will be as of January 1st and shall reflect the status of all personal property as of that date. All revaluation work shall meet the certification requirements of the Commissioner of Revenue.

**4.6** The Company will be responsible for all data entry and report generation.

**4.7** Class 504 public utilities

The valuation of the Class 504 utilities must be accomplished through the use of the 50/50 methodology which has been supported by the courts. Comprehensive appraisal reports need to be generated, determining the replacement cost new less depreciation by trending, through the use of the Handy Whitman Cost Index, all classes and items of personal property by year, with subsequent determination of depreciation for physical, functional and economic influences. The resulting value will be given equal weight with the net book value of the utility company to establish the final value.

**5.0 Public Information Program**

**5.1** The Board of Assessors 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. This program shall continue on a regular basis for the duration of the project.

**5.2** All public information activities should emphasize the responsibilities of the various participants, the appraisal methodology employed, and the overall goals of the project.

**6.0 Defense of Values**

**6.1** The Contractor shall provide expert witnesses, at no cost, to represent the Town at all appeals to any Court, Appellate Tax Board, or otherwise, of valuation and/or classifications resulting from this project. All expert witnesses must be approved by the Assessors.

**6.2** These services will include the preparation of detailed narrative reports, if required, at a per diem rate to be provided by the Contractor.

## **7.0 Project Timetable**

- 7.1** The Contractor must submit a comprehensive work plan at a minimum addressing the components indicated below and containing the following information for each component: starting date, completion date, and contractor's staff assignments for each year of the contract. The components to be addressed are as follows:

Project Start-Up  
Data Collection  
Coding  
Data Entry  
Valuation  
Assessors Review  
Preliminary Certification Review  
Final Certification Review  
Project Completion

## **8.0 Project Staffing**

- 8.1** 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  
Coding Personnel  
Personal Property Listers  
Data Processing Interface

- 8.2** 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

- 8.3** 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.



- 8.4** Since the project staffing is such an integral part of this project, contractors shall 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.
- 8.5** 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 such staff substitutions. Any substituted person must be of an experience level equal to or greater than the person being replaced.

## **MINIMUM EVALUATION CRITERIA**

In addition to the conditions established in Section #2, The Scope of Services, Contractors must also meet all provisions of the criteria as 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 Timetable, as proposed, must evidence a project completions date on or before August 31, 2024.
- (3) The proposed Project Director must have at least twenty (20) years of experience in a Project Director capacity relative to personal property valuation.
- (4) The Contractor must evidence the successful completion of at least twenty (20) personal property projects containing at least 500 accounts.

## COMPARATIVE EVALUATION CRITERIA

Contractors who satisfy all provisions of this RFP 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) Contractor's experience with other Personal Property programs in Massachusetts.

- A) Unacceptable:  
No experience in Massachusetts.
- B) Not Advantageous:  
Less than twenty successful Personal Property revaluations in Massachusetts.
- C) Advantageous:  
More than twenty, but less than fifty successful Personal Property revaluations in Massachusetts.
- D) Highly Advantageous:  
Fifty or more successful Personal Property revaluations in Massachusetts.

(2) Contractor's ability to utilize existing database and appraisal system. Personal Property - The Town utilizes the RRC Personal Property Software of Real Estate Research Consultants, Inc., which resides in-house.

- A) Unacceptable:  
No experience utilizing personal the RRC Personal Property Software.
- B) Not Advantageous:  
Ten or less successful revaluations utilizing the RRC Personal Property Software.
- C) Advantageous  
More than ten, but less than twenty successful revaluations utilizing the RRC Personal Property Software.

D) Highly Advantageous:  
At least twenty successful revaluations utilizing the RRC Personal Property Software.

(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 a Senior Personal Property Appraiser.

C) Advantageous:  
Revaluation experience of all of the staff as a Senior Personal Property Appraiser.

D) Highly Advantageous:  
Revaluation experience of all of the staff as Senior Personal Property Appraiser and experience utilizing the RRC Personal Property Software and direct personal property experience in the Town of Wareham.

(4) Qualification and experience of the Project Director.

A) Unacceptable:  
Less than ten years of experience in a Project Director capacity on Personal Property Projects.

B) Not Advantageous:  
More than ten, but less than fifteen years of experience in a Project Director capacity on Personal Property Projects and no supervisory experience in a community of 500 or more accounts.

C) Advantageous:  
More than fifteen, but less than twenty years of experience in a Project Director capacity on Personal Property Projects and direct experience in a 1,000 account community.

- D) Highly Advantageous:  
More than twenty years of experience in a Personal Property Project Director capacity, experience in a 1,000 account community, experience on the RRC Personal Property Software and direct personal property experience in the Town of Wareham.

(5) Experience of the Contractor

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

(6) Project Timetable

The Timetable, as proposed, must evidence a project completion date on or before August 31, 2024.

Any proposal that reflects anything beyond this date will be deemed unacceptable.

**PRICE PROPOSAL - PERSONAL PROPERTY**

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 this form for each year of the contract in its entirety and submit it in a separate envelope as their Price Proposal.

**Fiscal 2025**

<b>Listing and valuation of all 750 new and existing accounts@ _____/acct</b>	\$ _____
Appraisal and review of wireless and CATV accounts	\$ _____
Pricing of two (2) class 504 utilities (per DOR methodology requirements)	\$ _____
<b>Total for Fiscal 2025</b>	<b>\$ _____</b>

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

Company \_\_\_\_\_  
Authorized Signature \_\_\_\_\_  
Name and Title \_\_\_\_\_  
Date \_\_\_\_\_