

HAINES BOROUGH REQUESTS FOR PROPOSALS ASSESSING SERVICES

The Haines Borough, Alaska (hereinafter "Borough") is requesting proposals from qualified Alaskan real estate appraisal firms to act as its contractual Assessor for a one-year term, renewable for two additional one-year extensions by mutual agreement, and subject to availability of funds.

The Borough is a home-rule borough and taxes only real property. The Borough has approximately 3,500 parcels of property. Tax records may be viewed between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, at Haines Borough Administration, 103 Third Ave., S, Haines. Additional information required may be obtained by contacting the Borough Clerk, P.O. Box 1209, Haines, Alaska 99827, phone number 766-2231.

Borough Contact: Julie Cozzi, Borough Clerk
Phone: (907) 766-2231
Fax: (907) 766-2716
Email: jcozzi@haines.ak.us

Schedule and Submission of Proposals:

Proposal due date: July 6, 2010, 4:00 pm
Award date: July 13, 2010

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 actually received by that time will not be considered.

The outside of the envelope or cover sheet shall state "Assessment Services" and shall be sent to the Borough Clerk's Office, Haines Borough, P.O. Box 1209, Haines, Alaska 99827; faxed to (907) 766-2716; or emailed to jcozzi@haines.ak.us. Proposals or modifications to proposals submitted by facsimile will not be responsive or accepted unless all pages have been received and printed from the Borough's facsimile machine by the deadline. Proposers assume all risk the Borough's fax line will be busy or that the facsimile machine will not be operational at the time of submission.

I. Scope of Work:

Assess all taxable real property within the limits of the Borough 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 3.72 of the Haines Borough Code, 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 Borough before the Borough's 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.

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 at least \$1 million in general liability and automobile liability insurance as well as the Employer's limit and Statutory requirements for Worker's Compensation.

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 Haines Borough, which retains the right to approve or reject replacements. All sub-contractors shall be required to comply with insurance requirements identified above.

Proposers 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 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.

III. Specific Project Tasks:

- a) The Contract Assessor shall establish the full and true value of all taxable real property located within the Haines Borough 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 any exempt entity leases to others on an annual basis.
- d) The Contract Assessor shall create and/or update in full detail a property card for each parcel 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 Borough Clerk's office no later than March 1st each year of the contract.
- f) The Contract Assessor shall represent the Haines Borough 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 Borough 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 Haines Borough staff throughout the term of the contract for consultation.
- j) The Contract Assessor, after completion of the Board of Equalization hearings, shall assist the Borough Clerk in certifying the final assessment roll.
- k) The Contract Assessor must be accessible to the borough staff throughout the tax year to assist with correcting problems that may arise out of the assessment work.
- l) The Contract Assessor shall assist the Borough in preparing an annual report for the State Assessor.
- m) Assist staff in migrating paper property cards to a digital electronic format and in implementing a computer assisted mass appraisal system.
- n) Provide training to existing full-time Borough Assessor-In-Training staff.
- o) All work, paperwork, valuation models, calibration schedules and any other item used to set values, are to become the property of the borough

IV. Complete Review:

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

V. Borough Provided Services:

The Borough 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 Haines Borough), and office space and a phone while working on site in Haines.

It will be the responsibility of the Haines Borough to mail assessment notices and tax bills to property owners, and prepare newspaper notices as required by the Haines Borough Code. It will be the responsibility of Haines Borough to ensure that those appealing assessments to the Board of Equalization, do so on appropriate forms, and to validate properly filed appeals.

The Borough anticipates providing support to the Contract Assessor in the form of a full-time Borough assessor-in-training. The incumbent has approximately two-years of experience as a field appraiser and assessor training provided by the State of Alaska.

VI. Staff Training Requirements:

The proposer shall identify any training needs that may be required for borough staff in the use of any technology, products or services the prospective assessor may employ for this project.

VII. Compensation:

Proposers shall express their fee for the tax year of this proposed contract in a not-to-exceed sum to include all labor, materials, transportation costs, meals, lodging, and Board of Equalization expenses. A desired payment schedule shall be outlined in the proposal. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm.

The Contract Assessor may request an adjustment in the fee to be charged for each of the following years by giving written notice to the Borough on or before August 1st of each year. The notice shall state the amount of the adjustment requested and why such adjustment is necessary. The Borough shall have until the first regular Borough Assembly meeting held in September to reject the request. Upon rejection, the agreement may be terminated by either party.

If it should become necessary for the Haines Borough 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 Haines Borough and the firm.

VIII. Incurred Costs:

The Borough 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.

IX. Additional Considerations:

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

Either party may cancel the appraisal agreement without cause for the ensuing year by giving notice to the other party on or before August 1st of each year.

X. Rejection of Proposals:

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