

Request for Proposals
Assessing Services
Cities of Boyne City, Charlevoix and East Jordan, Michigan

Introduction

The Cities of Boyne City, Charlevoix and East Jordan, Michigan (collectively the “Cities”) are all Municipal Corporations providing general municipal services to their respective communities. Each community is located in Charlevoix County in northwestern, lower Michigan. Below is more specific information regarding each community:

2018 Community Information

	<i>Boyne City</i>	<i>Charlevoix</i>	<i>East Jordan</i>
2010 Population	3,735	2,513	2,351
Land area (sq. miles)	3.91	2.04	3.06
SEV (2018, L-4024)	225,038,700	317,362,000	62,924,185
TV	188,973,594	251,277,141	55,432,184
Number of Parcels	3,158	2,783	1,434
# of Residential [401]	2,748	2,274	1,153
# of Commercial[201]	196	214	117
# of Industrial [301]	20	17	17
# of Agricultural [101]	0	0	0
# of Personal Property [251, 351]	188	275	144
Utilities [551]	6	3	3
IFT	9	7	5

Assessing services for the three Cities have been jointly contracted since 2012. Based on the proposals, it is possible that the three Cities would enter into a three-year contract with the candidate who is awarded a contract under this Request for Proposals. Specific information regarding tax tribunal cases is available upon request.

Right of Refusal

The Cities of Boyne City, Charlevoix and East Jordan reserve the right to accept or reject any or all proposals in whole or in part, and to waive any informality, irregularity or defect in this process or in any proposal should it be deemed in the best interest of the three Cities.

Specific Services Required

- Current certification to legally perform the duties of Assessor for the Cities of Boyne City, Charlevoix, and East Jordan (including regulatory changes that may occur during the agreement)
- Proficient in BS&A/Equalizer software
- Maintain local phone number, email address and a minimum of eight (8) scheduled office working hours at each City Hall per week plus additional availability for meetings with residents, agents, and other interested parties

- Respond promptly to inquiries from both City staff, residents, county equalization staff and other interested parties
- Plan, supervise, and participate in the appraisal, re-appraisal, and assessment of all real and personal properties in the Cities in accordance with State law and their respective City Charters and ordinances
- Perform on-site inspections in compliance with Michigan law and to properly account for changes in property characteristics
- Maintain assessment rolls for each individual City, including ad valorem, specific tax rolls (IFTs, OPRAAs, PILTs, TIFs, DDAs, etc.), and special assessments in order to ensure compliance with State law and the City Charters
- Keep the property record field cards up-to-date
- In consultation with City staff, perform land division and combinations as necessary, complying with the State's Land Division Act and County/City procedures for land divisions
- Prepare the winter and summer assessment rolls for each City Treasurer
- Analyze property sales of all property classes within the three Cities to determine property values and appropriate assessment adjustments, including vacant land values
- Process all Principal Residence Exemptions (PREs), rescissions, Property Transfer Affidavits and Transfer Deeds
- Process all poverty and veterans exemption applications
- Verify millage rates for each City Council or City Commission. Obtain millage rates from other taxing jurisdictions.
- File all necessary State and County reports pertaining to the Assessment and Tax Rolls annually.
- Prepare a report for each City regarding the status of the Assessing Department and the Assessment Roll and present it to the City Council/Commission. Attend City Council/Commission, Board of Review (if required by City Charter) and/or committee meetings as needed.
- Complete Apex land and building footprint sketches for all real properties
- Maintain accurate ownership and address information and process address change requests in a timely fashion
- Update each City Treasurer's Department personnel with pertinent information on all name and address changes made to the database(s). All assessment files will be the property of and kept at the respective City Halls.
- Track all building permits and re-assess all properties with construction activity requiring a building permit to ensure that assessments are accurate
- Maintain parcel and tax maps including any future GIS component to this
- Process Personal Property Statements, including conducting an annual inspection to ensure an up-to-date list of personal property. Comply with all Personal Property Tax reporting requirements to the State of Michigan, tracking any required reductions.
- Upon request, meet with taxpayers regarding assessment determinations and to explain appeal procedures
- Respond to complaints pertaining to assessing property
- Act as the liaison in communicating with the public, media, and other governmental agencies on assessing issues
- Provide assessment information to the public similar to how the Cities currently provides this information on their websites. Send out printed assessment notices to all property owner in accordance with State laws.
- Represent each City in defense of existing and future assessment appeals to the Board of Review, the Small Claims division of the Michigan Tax Tribunal, and the full Michigan Tax Tribunal

- Coordinate with the respective City attorneys in the defense of appeals
- Prepare changes to the roll based on decisions of the Board of Review and/or Michigan Tax Tribunal
- Coordinate with Charlevoix County Equalization Department office to facilitate the digital and manual transfer of data and values
- Communicate openly and in a timely fashion with City staff and the public in handling appeals to ensure the Board of Review has all available information to render their decisions. The Assessor is expected to present a positive professional image in both dress and conduct while interfacing with City staff and the public.
- Update market values for land and buildings owned by the Cities. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
- Perform all other duties incidental to the normal duties of an Assessor
- Make timely taxable value estimates. Timing of the taxable value estimates will need to be negotiated with each City.
- Assist with the AMAR and advise each municipality of standard and recommended actions to ensure each municipality remains in full compliance with the State Tax Commission
- Conduct all action in accord with the Supervising Preparation of the Assessment Roll and any other guidance, statute, or best practice as now or in the future may be created

City Clerical/Administrative Assistance Services Offered

Boyer City, Charlevoix and East Jordan will provide limited clerical services to assist the Assessor(s). The limited support will include answering routine telephone calls and walk-in requests for assessment data, provide the Assessor's telephone number to residents as necessary, assist in scheduling assessment related appointments, provide copies of all assessment open records as requested and assist in mailing notices. The Cities will be responsible for printing assessment notices and tax bills and payment of postage. The Cities will continue to schedule the Board of Review meetings at their respective City Halls and post the public notices. Each City will provide office space to include a desk, chair, filing cabinets and either a laptop or desktop computer (if specifically requested in the proposal). Each City will also supply BS&A/Equalizer Software.

Proposal Requirements

The selection process will be focused upon quality-based selection criteria. Those interested in submitting sealed proposals must submit six copies. The proposals shall include a list of current clients and projects along with a list of references (minimum of three). The respondent should provide:

- Copy of his/her Level II or higher Certification document, documentation of any other related certifications
- The total annual compensation rate to provide the assessment services in the above Specific Services Required and in accordance with the applicable laws of the State of Michigan for the years 9/1/2018-8/31/2019, 9/1/2019-8/31/2020 and 9/1/2020-8/31/2021. The Cities will pay the annual compensation rate based upon progress of the work that has been completed. Bidders shall express their fees for each year of the three-year contract for each individual municipality in a not-to-exceed sum to include all of the Assessor's costs, including but not limited to: labor, materials, transportation costs, meals, lodging, Board of Review, Small Claims divisions of the Michigan Tax Tribunal and the full Michigan Tax Tribunal expenses. All incidental expenses will be the responsibility of the Assessor(s) or Assessing Firm.

Other information

The successful Assessor(s) or Assessing Firm will be selected and hired by each individual municipality that is most advantageous to the Cities. The Request for Proposals will serve as the basis of the initial services contract with the Assessor or Assessing Firm.

Evaluation Criteria

The following evaluation criteria will be used to review the Assessing Services proposals that are received and which meet the general quotation requirements.

1. Demonstration of successful experience in providing general assessment services to municipalities of a similar or larger size
2. Past experience with providing assessment and revaluation services. Demonstration of a high level of accuracy in assessment work for municipal clients
3. Cost of assessment services
4. Evidence of positive customer interaction

Deadline

Six copies of the Proposal shall be delivered in a sealed package to Joyce Golding, Charlevoix City Clerk at the address below. Packages should be clearly marked "City Assessor RFP". Proposals are due and will be opened at 10am EDT on July 9, 2018. Proposals received after this time will not be considered.

Charlevoix City Clerk
210 State Street
Charlevoix, MI 49720

Questions and/or clarification can be directed to the Charlevoix City Manager at (231) 547-3270 or markh@charlevoixmi.gov.