

**DELTA COUNTY BOARD
OF COMMISSIONERS**
310 Ludington Street, Suite 222
Escanaba, Mi 49829

1 GENERAL INFORMATION

1.1 Purpose

Delta County and the City of Escanaba are jointly soliciting competitive sealed proposals to provide Equalization Services to Delta County and Assessor Services to the City of Escanaba.

1.2 Background

Delta County has terminated its contract with AIS Marketing effective December 31, 2016. This contract provided for a Level IV certified Equalization Director to sign the county's Equalization studies, perform required on-site field assessments, and perform other related Equalization services. Delta County is seeking Equalization options for the period January 1, 2017 through December 31, 2018 (two years)

Escanaba currently has an opening for an Assessor. The position has previously been a full-time on-site position but the City is currently exploring contractor options which may primarily include work from a remote location.

1.3 Scope of Work

The awarded vendor must present a proposal capable of providing all of the following Equalization Services:

- Completion of all required annual appraisal and sales studies.
- Preparation and coordination of Delta County's annual apportionment report.
- Preparation of the county's annual equalization report.
- Training, on-going support and oversight of all local unit assessors within Delta County.
- Representing the Delta County Board Commissioners at State Tax Tribunal hearings, including preparation of relevant data and information.
- Completion and filing of all Equalization reports required under state law.
- Research and respond to any relevant equalization, appraisal or taxation questions by the County Administrator or Board of Commissioners.
- Coordination with Delta County's geographic information system (GIS) provider to improve the county's mapping and parcel information.
- Present relevant studies and information to the Delta County Board of Commissioners.

The awarded vendor must also present a proposal capable of providing all of the following Assessor Services for the City of Escanaba:

- Manage the planning and execution of inspection, appraisal, recording, and verification of real and personal property assessments.
- Manage the review of building permits for new and additional improvements, site inspect, and estimate new valuation.
- Manage the review of ownership documents for ownership, descriptions, sales data, and other pertinent information.
- Manage the performance of annual personal property canvass, prepare personal property statements and audit personal property statements.
- Manage and participate in the annual analysis of sales data to determine sales ratios and land values.
- Manage the preparation and maintenance of tax rolls, tax bills, and assessment rolls including IFT, OPRA, NRE assessment rolls.
- Manage the poverty, veteran, primary residence, and other exemption application process, including the obsolete property rehabilitation district exemptions.
- Support the Board of Review and City Budgeting process and city Brownfield authority.
- Analyze, provide input on, and implement Delta County's proposed sales ratio or appraisal studies.
- Prepare various correspondence, records and reports, including all reports and forms required by the State of Michigan.
- Participate in Michigan Tax Tribunal cases and appeals.

1.4 Residency/Travel

Neither the vendor or any awarded sub-contractor is required to live in Delta County, however all travel costs (including mileage and housing) should be included in the bid price. No travel costs will be reimbursed. The Equalization Director/Assessor will be required to have at least four working days of office hours on site in Escanaba every three months.

1.5 County/City Responsibilities

Delta County will provide: sufficient on-site office space; support and maintenance of the BS&A system; and reimbursement for printing, postage, and legal notices.

The City of Escanaba will provide: sufficient on-site office space; support and maintenance of the BS&A system; reimbursement for printing, postage, and legal notices; and appropriate Assessor Department staff.

1.6 Vendor Experience and Qualifications

All vendors must provide a Level IV certified Equalization Director, as certified by the State Assessor's Board, during the duration of the agreement. Field and appraisal studies must also be conducted by an Assessor certified at the appropriate level. Vendors should demonstrate experience providing all duties listed under the scope of work above.

1.7 Insurance

Vendors must provide appropriate liability insurance.

1.8 Schedule of Events

Proposals must be received, in a sealed envelope in the Administrative Office, Delta County Courthouse, 310 Ludington St, Suite 222 Escanaba MI 49829, no later than **November 15, 2016 at 4:00 p.m.** Proposals will be opened at the November 15, 2016 Board of Commissioners Meeting, in the Delta County Service Center Board Room at 5:15 p.m. Proposals received after 4:00 p.m on November 15, 2016 will not be opened or eligible for consideration.

The Escanaba City Council will review applications following Delta County at its first scheduled Council meeting following November 15, 2016.

1.9 Amendments to Proposals

Amendments to or withdrawals of proposals will only be allowed if acceptable requests are received prior to the deadline (**4 p.m on November 15, 2016**) set for receipt of proposals. No amendments or withdrawals will be accepted after the deadline unless they are in response to the County's request.

1.10 Required Review

Defects: Vendors shall carefully review this RFP for defects and questionable or objectionable matter. Comments concerning defects and questionable material must be made in writing and received by Ryan Bergman, Delta County Administrator, 310

Ludington Street Suite 222, Escanaba, MI 49829. Telephone conversations are not considered official and must be confirmed in writing by the interested party.

If an addendum is issued, it will be provided to all parties who were provided a copy of the RFP.

1.11 Disclosure of Proposal Contents

All proposals and other material submitted become the property of Delta County and may be returned only at the County's option. Information contained in the proposals will be disclosed and discussed during the evaluation process. Under Michigan's "Right to Know" laws, public records are required to be open to reasonable inspection. All proposal information including detailed price and cost information will be held in confidence prior to the public opening of bids.

Trade secrets and other proprietary data contained in proposals may be held confidential if the vendor requests in writing that the County does so, and the information is eligible for exclusion under Michigan's Freedom of Information Act. Material considered confidential by the vendor must be clearly identified and the vendor must include a brief statement that sets out the reason for confidentiality.

1.12 Subcontractors

Subcontractors may be used to perform portions of the work under this contract. If a vendor intends to use subcontractors the vendor must identify, in their proposal, the names of the subcontractors and the portion of the work the subcontractors will perform. Vendors must provide the following information concerning each prospective subcontractor within five business days from the date of the County's request:

- a) Complete name of the subcontractor,
- b) Complete address of the subcontractor,
- c) Type of work the subcontractor will be providing,
- d) A written statement, signed by each proposed subcontractor, which clearly verifies that the subcontractor has agreed to render the services required by the contract.

A vendor's failure to provide this information within the required time frame may cause the County to consider the proposal non-responsive and reject the proposal. The substitution of one subcontractor for another may be made only at the discretion of the County and with prior written approval of the County. Such approval shall not be unreasonably withheld.

1.13 Response Format and Content

The response format is flexible but should include all of the following:

- Written description of how the contractor intends to fulfill all obligations covered under the scope of work.
- Acknowledgement that all travel costs to, from, and within Delta County will be paid by the contractor.
- Demonstration of vendor experience and qualifications, including proof of licensure.

- Proof of appropriate liability insurance, or a quote indicating they will be able to immediately obtain insurance if awarded.
- Written description of the planned use of sub-contractors if applicable, fulfilling all obligations under 1.12 of this RFP.
- Staff assignment plan, describing the responsibilities of each person to be involved with the project and the planned number of hours of work to be delivered by each.
- The bid price, in either an annual lump-sum not to exceed amount, or in a two-year lump-sum not to exceed amount.
- References

Failure to include these items may cause the proposal to be determined to be non-responsive and the proposal may be rejected.

1.14 Preparation Costs

The County or City is not responsible and will not pay for any costs associated with the preparation, submittal, or presentation of any proposal.

2. STANDARD CONTRACT INFORMATION

2.1 Contract Term

The contract shall be effective from the date a contract is signed by the Delta County Board and the Escanaba City Council. The contractor will be paid monthly, or quarterly, depending on their preference.

2.2 Tax Exemptions

The County and City are exempt from federal excise and transportation taxes. The County's registration number with the IRS is 38-6004846. The city's registration number with the IRS is X. No exemption certificates are required and none will be issued.

2.3 Additional Terms and Conditions

The County reserves the right to add terms and conditions during contract negotiations. These terms and conditions will be within the scope of the RFP and will not affect the proposal evaluation.

3. PROPOSAL EVALUATION, SELECTION AND AWARD PROCESS

3.1 Proposal Evaluation

All proposals will be reviewed to determine if they are responsive. The Board of Commissioners will select their appraisal based on factors to include, but not limited to: qualifications; experience; and cost. Both the Board of Commissioners and Escanaba City Council reserve the right to accept or reject proposals at their discretion.