

TOWN OF CLAYTON, NEW YORK

**REQUEST FOR PROPOSALS
TOWN-WIDE REASSESSMENT PROJECT
2022 -2023
JANUARY 17, 2022 - 2:00PM**

RFP DOCUMENTS

OCTOBER 2021
REISSUED DECEMBER 2021

Issued by:

Town of Clayton
405 Riverside Drive
Clayton, NY 13624

TOWN OF CLAYTON, NEW YORK
NOTICE OF REQUEST FOR PROPOSALS
TOWN-WIDE REASSESSMENT PROJECT
2022 - 2023
DUE JANUARY 17, 2022 BY 2:00PM

The Town of Clayton is soliciting sealed proposals from qualified firms to provide professional assessment support and valuation services as part of a city-wide reassessment project for the Town of Clayton to be completed for the 2023 roll year.

The Town of Clayton has approximately 4,022 parcels including 2,683 residential parcels, 979 vacant land parcels, 105 farm parcels, with the balance of 255 commercial parcels. Included in this total are 742 parcels located on islands within the township and classified as "Unique and/or Highly Complex Parcels" for the purposes of this RFP. A listing of those parcels is included at the end of this Request for Proposals.

The Town conducted a City-wide reassessment project in 2013. The current equalization rate is 98%.

The Town is interested in hiring a professional appraisal and consulting firm to conduct a comprehensive reassessment project including data verification, valuation, field review, public relations and all management of the project.

Proposals must be submitted by January 17, 2022 no later than 2:00 P.M. to Town of Clayton, Attn: Town Clerk, 405 Riverside Drive, Clayton, NY 13624.

Late submissions will not be accepted and will be returned unopened. Proposals submitted shall be clearly identified on the outside of the envelope with the Name of Project and the Company submitting the proposal.

Copies of specifications and conditions may be obtained at the above address. The Town of Clayton reserves the right to reject any or all proposals and will award to the respondent deemed to best serve the needs of the Town and to waive any informalities or defects in such proposals before or after opening. All bids shall include a Bid Proposal Form, "Non-Collusion" statement, and an "Authorization to Bid" form, if applicable.

Town of Clayton, New York
315-686-3512
(10-28-2021/12-31-2021)

Issued October 28, 2021
Reissued December 31, 2021

TOWN OF CLAYTON, NEW YORK
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1. Purpose

The Town of Clayton is soliciting sealed proposals from qualified firms (Contractor) to provide professional assessment support and valuation services as part of a town-wide reassessment project for the Town of Clayton and as outlined in the SCOPE OF SERVICES section of this request to be completed for the 2023 roll year.

2. Background

The Town of Clayton has approximately 4,022 parcels including 2,683 residential parcels, 979 vacant land parcels, 105 farm parcels, with the balance of 255 commercial parcels. Included in this total are 742 parcels located on islands within the township and classified as "Unique and/or Highly Complex Parcels" for the purposes of this RFP. A listing of those parcels is included at the end of this Request for Proposals.

The Town conducted a City-wide reassessment project in 2013. The current equalization rate is 98%.

The Town is interested in hiring a professional appraisal and consulting firm to conduct a comprehensive reassessment project including data verification, valuation, field review, public relations and all management of the project.

3. Scope of Services

The Contractor will agree to perform the following services as directed by the Town:

- a) Public Relations - design and implement a comprehensive public relations plan
- b) Data Verification all parcels (Residential, Commercial, Farm and Vacant Land)
- c) Digital sketches and photographs of all improved parcels
- d) Sales Verification
- e) Sales Brochures for Commercial Type Parcels with detailed description of property, complete sales write up and verification of all sales listed
- f) Neighborhood Delineation and Updating
- g) Valuation: (within RPSv4)
 - i. Residential Models and PIDS
 - ii. Commercial Valuation Factor File
 - iii. Land Tables
 - iv. Time Trending

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- h) Valuation Documents for all parcels
- i) Field Review -all parcels
- j) All data Entry
- k) Impact Analysis
- l) Informal Hearings - schedule and conduct m) Mailings:
 - i. Residential Property Inventory Mailer
 - ii. Commercial I & E Surveys
 - iii. Assessment Disclosure Mailing
 - iv. Change of Assessment Notices (post informal reviews)
- n) BAR - Training Class -Update BAR members on Project Outcomes
- o) BAR Support for Assessment Office
- p) "Unique and/or Highly Complex Parcels" - See attached list of parcels.
Contractor must provide a separate "per parcel" add-on price for assistance in valuing these parcels.
- q) Small Claims and Article 7 support should be listed as an option with corresponding pricing.

4. Summary of Assessment Timeline

- Start date no later than January 27, 2022
- Mailing of New Assessments, no later than March 1, 2023
- Informal assessment reviews: March -April 2023
- Completion of the assessment roll for filing of the Tentative Assessment Roll on May 1, 2023
- Board of Assessment Review meeting on the Wednesday after the fourth Tuesday of May 2023 or adjourned hearing date(s) yet to be determined
- Completion of the assessment roll for filing of the Final Assessment Roll on July 1, 2023

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5. Responsibility of Town I Assessor

Assessment Functions: all normal assessment functions including, but not limited to, timely updating of splits, combinations, posting of sales, any additional data entry not mentioned in this contract, clerical updating of RPS files.

Hardware/Software: The Town of Clayton Assessment Office will allow the use of its computer and access to the files on its network necessary to complete the updates and analysis or provide remote access to the Town's RPS file.

6. Term

It is intended that this agreement will be for the period January 27, 2021 – July 1, 2023.

7. Professional Liability Insurance

The Contractor shall, at its sole expense, acquire, continuously maintain during the period in which the Contractor is performing services, and provide the Town with acceptable proof of professional liability insurance coverage with an annual aggregate of not less than \$2,000,000 per occurrence, covering acts, errors, or omissions of a professional nature committed or alleged to be committed by the Contractor or any of its subcontractors as a part of its performance of professional services. The Contractor shall agree to maintain in full force and effect during the term of the contract Workers Compensation Insurance.

In addition, the Contractor agrees to indemnify and hold harmless the Town against all liabilities, claims and demands for personal injury or property damages or other expenses suffered or arising out of or caused by any negligent acts or omissions of the Contractor, its subcontractors, agents, or employees incurred in the performance of its services.

8. Compensation

The Town desires to enter into a professional services agreement. Unless otherwise agreed for a specific item, compensation for services rendered will be based on a fixed fee schedule. Proposals must indicate hourly rates for optional services. If any additional service request arises and are not included in this agreement, an addendum to the agreement will be required. All compensation payments will be made directly to the Contractor.

If the Contractor should subcontract any portion of the project, any additional cost or expenses incurred for said subcontractor(s) will be the responsibility of the Contractor or their subsidiaries.

The Contractor will be reimbursed by the Town in accordance with the terms for payment as they will appear in the service agreement contract. All requests for payment are to be submitted on the appropriate voucher to be provided by the Town.

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9. Qualifications

Expertise of the firm shall be demonstrated by proof of past project successes providing similar services as described in Section 3. The proposals will be evaluated on knowledge, experience, and successes of these similar services. The selected firm shall follow ORPTS rule, procedures and guidelines and be capable of completing the Reassessment Project.

Proposals must include the following qualification details:

- a. The size of the firm;
- b. The names and qualifications of the professional staff that will be managing the project, including, but not limited to, educational background, and detailed work experience;
- c. Three references from municipalities of similar population. The references must include contact name, municipality name, address, telephone number, and email address;
- d. Description of capabilities in working with RPS and statistical programs.
- e. As indicated in the scope of services, if the selected firm subcontract(s) with any other individual(s) or firm(s) to complete any item(s) identified in the "Scope of Services," the qualifications of this individual(s) or firm(s) must be included in the proposal.

10. Conflicts of Interest

As part of your submission, please list any potential conflicts your firm might have due to work being done for outside parties. This should include, but not limited to, other work being done by your firm with others doing business in the Town of Clayton.

11. Selection Process

All submitted proposals will be reviewed by the Town and will be evaluated with regards to qualifications and municipal experience. The Town may elect to interview select candidates in order to determine the firm which will provide the best services for the Town of Clayton. The Town reserves the right to negotiate terms with the selected respondent prior to entering into formal agreement. All firms who respond to the RFP will be notified of the results.

12. Rejection of Proposals

The Town reserves the right to reject any or all proposals, or to reject any proposal if the evidence submitted by, or investigation of such respondent fails to satisfy the Town that such respondent is properly qualified to carry out the obligations of the RFP and to complete the work contemplated therein. The Town reserves the right to waive any minor informality in the RFP. The Town reserves the right to request additional data or information regarding written proposals.

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13. Questions

Inquiries may be directed to Kimberli Johnston; Town Assessor via email kmjohnston@townofclayton.com. All questions must be submitted in writing no later than JANUARY 10, 2022.

14. Proposal Requirements

1. Name, email and telephone number of person(s) to be contacted for further information.
2. Qualification Details as outlined in Section 9: Qualifications.
3. A list of all personnel who will be involved with the reassessment project, including their years of experience, qualifications, and proof of certification.
4. Listing of all projects completed during the past 3 years and those scheduled for the current year, including client names, telephone numbers, and sizes indicated by number of parcels and scope of services rendered.
5. If selected, the contractor will be required to provide proof of liability professional insurance and Workers Compensation Insurance, as stated above and per the Town's Standard Insurance Requirements included.
6. Non-Collusive Bidding Certification Form
7. Authorization to Bid Form, if applicable
8. Bid Proposal Form

15. Proposal Submission Information

Submission Date and Time: By JANUARY 17, 2022 BY 2:00PM.

10 Hard copies of all proposals, which includes one (1) original and nine (9) copies, as well as one (1) electronic copy on CD or flash drive to:

Town of Clayton
Town Clerk
405 Riverside Drive
Clayton, NY 13624

Clearly mark the submittal with the title "TOWN OF CLAYTON REASSESSMENT PROJECT" and the name of the responding firm. Only those RFP responses received prior to or on the submission date and time will be considered.

The Town will not accept proposals submitted electronically.

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16. Proposal Process Schedule

This schedule is only an estimated timeline and may be changed without written notice.

- Reissuance of RFP: DECEMBER 31, 2021
- Receipt of Inquiries from Contractors: JANUARY 10, 2022 at 12:00pm
- Receipt of Sealed Proposals: JANUARY 17, 2022 at 2:00pm
- Conduct Company Interviews Week of, if the Town determines interviews are needed: JANUARY 18-25, 2022
- Announcement of Most Responsible Bidder: JANUARY 27, 2022

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**Insurance Requirements for
Contractors, Vendors and Suppliers of the
Town of Clayton**

Minimum required insurance limits (coverage on an occurrence basis form) Commercial General Liability

- \$2,000,000 Products/Completed Operations Aggregate
- \$2,000,000 General Aggregate
- \$1,000,000 Any One Occurrence
- \$1,000,000 Personal & Advertising Injury
- \$10,000 Medical Payments

Automobile Liability (Comprehensive Coverage)

- \$1,000,000 Combined Single Limit

Commercial Excess Liability (Umbrella)*

- \$3,000,000 Any One Occurrence
- \$3,000,000 Annual Aggregate

Employers Liability (Coverage "8" on the Workers' Compensation Policy)

- \$100,000 Each Accident
- \$100,000 Each Employee for Injury by Disease
- \$500,000 Aggregate for Injury by Disease

* Excess-Umbrella Liability requirement will be made at the discretion of Town of Clayton Management.

TOWN OF CLAYTON – STANDARD CONTRACT INSURANCE REQUIREMENTS

INSURANCE:

Contractor /vendor shall not commence work under this contract until he has obtained all insurance required under the following paragraphs and such insurance has been approved by the Town of Clayton.

WORKER'S COMPENSATION INSURANCE:

Contractor /vendor shall take out and maintain during the life of this contract, worker's compensation insurance and employer's liability insurance for all of his employees employed at the site of the project.

GENERAL LIABILITY INSURANCE:

Contractor/vendor shall take out and maintain during the life of the contract, such bodily injury liability and property damage liability insurance as shall protect him and the Town from claims for damages for bodily injury including accidental death, as well as from claims for property damage

which may arise from operations under this contract, whether such operations be by himself or by any subcontractor or by anyone directly or indirectly employed by either of them. It shall be the responsibility of the contractor /vendor to maintain such insurance in amounts sufficient to fully

protect himself and the Town, but in no instance shall amounts be less than those set forth below. These amounts are specified only to establish the minimum coverage acceptable.

Bodily injury liability insurance in amount not less than \$1,000,000 (one million dollars) for injuries, including wrongful death, to any one-person(s); \$2,000,000 (two million dollars) aggregate.

Property damage liability insurance in an amount of not less than \$500,000 (five hundred thousand dollars) for damages on account of any one occurrence.

Or combined single limit of liability in amounts of \$1,000,000 (one million dollars) per occurrence and \$2,000,000 (two million dollars) aggregate.

OTHER CONDITIONS GENERAL LIABILITY INSURANCE:

1. Coverage shall be written on comprehensive general liability form.
2. Coverage shall include:
 - a. Contractual liability.
 - b. Independent contractors\Products and completed operations.
3. "TOWN OF CLAYTON, 405 RIVERSIDE DRIVE, CLAYTON, NY 13624" shall be added to the Comprehensive General Liability policy as "Additional Insured Primary and Non-Contributory Basis".

TOWN OF CLAYTON – STANDARD CONTRACT INSURANCE REQUIREMENTS

AUTOMOBILE LIABILITY INSURANCE:

Automobile bodily injury liability and property damage liability insurance shall be provided by the contractor/vendor with a minimum combined single limit (CSL) of \$1,000,000 (one million dollars.)

OTHER CONDITIONS OF AUTOMOBILE LIABILITY INSURANCE:

1. Coverage shall include:
 - a) All owned vehicles
 - b) Hired car and non-ownership liability coverage
 - c) Statutory no-fault coverage
2. If any of the contractor's/vendor's policies of insurance are canceled or not renewed during the life of the contract, immediate notice of cancellation or non-renewal shall be delivered to the Town no less than thirty (30) days prior to the date and time of cancellation or non-renewal.

CERTIFICATE OF INSURANCE:

The contractor /vendor shall file with the Town of Clayton prior to commencing work under this contract, a certificate of insurance to be delivered to the Finance Office.

1. Certificate of Insurance shall include:
 - a) Name and address of insured
 - b) Issue date of Certificate
 - c) Insurance company name
 - d) Type of Coverage in effect
 - e) Policy Number
 - f) Inception and expiration dates of policies included on certificate
 - g) Limits of liability for all policies included on certificate
 - h) Certificate holder shall be:
TOWN OF CLAYTON
405 RIVERSIDE DRIVE, CLAYTON, NY 13624

NAMED AS "ADDITIONAL INSURED PRIMARY AND NON-CONTRIBUTORY BASIS".

2. If the contractor's/vendor's insurance policies should be non-renewed, canceled or expire during the life of the contract, the Town shall be provided with a new certificate indicating the replacement policy information as requested above.

TOWN OF CLAYTON – STANDARD CONTRACT INSURANCE REQUIREMENTS

INDEMNIFICATION CLAUSE:

The contractor /vendor agrees to protect, indemnify and save harmless the Town of Clayton against any and all claims, suits and demands which the contractor /vendor may suffer because of the operation or actions of the contractor /vendor, its agents or employees, including but not limited to its failure to properly perform the work under the contract and/ or purchase order, its failure to maintain any policy of insurance required by this contract and/ or purchase order, its failure or refusal to provide any forms, certificates or documentation required by this agreement or law.

REVISED OCTOBER 2021

TOWN OF CLAYTON, NEW YORK

NON-COLLUSIVE BIDDING CERTIFICATION

(Required by Section 103-d of the New York State
General Municipal Law)

By submission of this Bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of knowledge and belief:

1. The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder, with any competitor or with any potential competitor;
2. Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to the opening of bids or proposals for this project, directly or indirectly, to any other bidder or to any competitor or to any potential competitor;
3. No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition;
4. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing on its behalf; and
5. That attached hereto (if corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signatory of this bid, or proposal, in behalf of the corporate bidder.

(Name of bid/date of bid opening)

By: _____
(Authorized signature) (Individual's name & title)

(Company name and address and phone number)

Date Signed: _____

AUTHORIZATION TO BID

RESOLVED, that _____
(Name of Individual)

be authorized to sign and submit the bid or proposal of

(Name of Corporation)

for the supply of fuel and to include in such bid or proposal the certificate of non-collusion required by Section 103-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by

(Name of Corporation)

at a meeting of this board of directors held on the _____ day of _____, 2022.

Secretary

(CORPORATE SEAL)

FORM OF PROPOSAL
Town of Clayton
RFP Town-Wide Reassessment Project 2022-2023

The Undersigned _____
(Contractor)

Address _____

Zip Code _____

Hereby certifies that he/she has examined and fully comprehends the requirements prepared by the *Town of Clayton for the RFP Town-Wide Reassessment Project 2022-2023*. To furnish all services, as listed below:

Fixed Fee for Scope of Services §3 (a-o):

\$ _____

Fixed Per Parcel Fee for Scope of Services §3 (p) Unique and Highly Complex Parcels (herein identified as 742 Island Parcels listed in Appendix A):

\$ _____

Fixed Fee for Scope of Services §3 (q) Small Claims and Article 7 support:

\$ _____

If the Proposer does not choose to provide rates for all categories, insert "No Bid".

Name of Proposer

Signature

Federal Employer ID #

Printed Name of Signer

Title _____

Street _____

Phone _____

City/State _____

Fax _____

email _____