

City of Mt. Pleasant



Request for Proposal

Assessing Field Work - Residential Property

Issued May 20, 2015

DEADLINE —1:30 P.M. Tuesday June 9, 2015

CONTACT:

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Mt. Pleasant, MI 48858

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**Assessing Field Work -
Residential
City of Mt. Pleasant**

The City of Mt. Pleasant, Michigan, is requesting sealed bids at the Office of the City Clerk, City Hall, 320 West Broadway Street, Mount Pleasant, Michigan 48858, until 1:30 p.m. (local time), on June 9, 2015, at which time and place the bids will be publicly opened and read. All bids shall be submitted in a sealed envelope, plainly marked, "**Assessing Field Work**".

Complete bid specifications are available at the City Clerk's Office, City Hall, 320 West Broadway Street, Mount Pleasant, Michigan 48858, 989-779-5361, Monday through Friday, 8:00 a.m. to 4:30 p.m. or on the City's website at www.mt-pleasant.org.

Questions regarding the bid specifications or bid process should be directed to David S. Rowley, City Assessor

The City of Mt. Pleasant reserves the right to accept or reject any or all bids, to waive any irregularities in the bids, and to select the bid considered most advantageous to the City.

Published: May 20, 2015

Jeremy Howard, City Clerk
989-779-5374

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I. BACKGROUND

A. PURPOSE

The City of Mt. Pleasant, Michigan is requesting proposals from firms or individuals to assist with residential field work measurement and inspections for the annual tax assessment roll. The City of Mt. Pleasant wishes to retain the services of a qualified firm or individual to assist with the residential field work. The field work will be for new construction permits and residential parcels as part of the assessing department's annual property record card review.

The scope of work under this proposal will begin in June 2015 for the 2016 assessment roll. The project may also be extended into 2016 for the 2017 assessment roll and 2017 for the 2018 assessment roll.

B. INTRODUCTION

Mt. Pleasant is 7.8 square miles, located in the geographic center of Michigan's lower peninsula. It is dedicated to retaining small town traditions while building a vital economy, thus assuring a stable future for its residents. The city prides itself on its thriving downtown district, consisting of more than 135 businesses that range in specialties and offerings. Additionally, Mt. Pleasant provides unique cultural attractions, scenic parks placed along the meandering Chippewa river, and other remarkable social experiences.

Due to a variety of special events planned within city limits, including the successful state softball tournament and Street Festival, the area population can swell to two-to-three times the official 26,016. An additional draw to the area includes the thousands of visitors each day to the Soaring Eagle Resort and Casino, located at the east city limits.

Mt. Pleasant is also home to Central Michigan University, a doctoral-intensive university serving more than 20,000 students with excellent educational opportunities and partnerships with businesses throughout the state of Michigan. Fully accredited, CMU continues to be an educational leader, with 38 academic departments and more than 150 field of study.

For more information about the City visit www.mt-pleasant.org.

II SERVICES REQUESTED

A. SCOPE OF SERVICES

The City of Mt. Pleasant is requesting proposals from individuals or firms, to assist the Assessing Department in completing residential real property fieldwork including the following duties. The City Assessor will provide the list of parcels to be inspected.

1. Field Inspection

A. Exterior inspection – measure and list residential real property within a specified ECF neighborhood(s) to verify existing exterior dimensions.

B. Interior inspection – request an interior inspection of property via letter from City Assessor and resulting call to schedule or by leaving a card at the property requesting a call to schedule. The contracted inspector will coordinate and schedule the specific time for access to the property for interior inspection. The interior inspection will consist of the data collection as outlined in appendix A attached.

2. Digital photos – two photograph taken at an angle from front and rear of the subject property.
3. Data entry into the City’s database (accomplished at a designated work station in City Hall)
 - A. Updated or new sketch of the property into APEX software
 - B. Dimension and features of the property into BS&A software
 - C. Attachment of digital photos to the respective parcel
4. Monthly progress reports must be provided to the City Assessor showing which parcels are complete.
5. Annual report for all new construction permits depicting the percent complete.
6. Meetings with the City Assessor as requested to discuss questions/concerns on data provided.

NOTE: all inspections conducted at the request of the Assessor will be paid at a “Per Parcel” rate only. That rate will include any preparation work to review the file, record card, or permit; all contacts made to schedule the inspection with a homeowner or follow up on any data; the actual exterior and interior inspections; and data entry as defined above.

B. VOLUME OF WORK

The 2015 assessment roll has 4,295 residential parcels. A base bid is being requested assuming 3%, or 130 of the parcels (generally grouped geographically together) are inspected this year.

An alternate bid A is requested for 5% or 215 of the parcels.

An alternate bid B is requested for 10% or 430 of the parcels.

The bid will also include approximately 100 new construction permit inspections per year.

C. TIMING OF WORK

For 2015, the listing of residential parcels will be available from the Assessor’s office by June 30, 2015. The inspections and data entry must be complete by December 15, 2015.

The new construction listing based on residential permits will be available no later than November 1 and must be completed by December 15, 2015. A detailed list of partial new construction parcels (% complete) must be provided to the City Assessor by December 15, 2015.

The Assessor and contractor must mutually agree to the actual timing of the work so that appropriate notice may be given to the property owners by the City Assessor office of the upcoming inspection.

Additional work may be extended for the years of 2016 and 2017.

D. REQUIRED CERTIFICATIONS, SKILLS, AND EQUIPMENT

The field worker completing the inspections must possess the following:

1. Minimum of Certified Michigan Assessing Officer (MCAA). The firm or contractor must provide the name and certification level held by the person performing the work.
2. Preferred 1-3 years field experience
3. Preferred knowledge of APEX sketch software
4. Preferred knowledge of BS&A Assessing software
5. Measuring device and any other equipment needed to complete inspections
6. Digital camera and memory card to use to transfer photos
7. Cell phone to allow contact by the City staff while doing field work

E. AVAILABILITY

The inspector shall be available to the Assessor and Department Staff by telephone, email, and facsimile to respond to inquiries and provide and receive information.

The inspector will be required to respond to requests for scheduling of inspections. All inspections shall be performed during a work schedule approved by the City Assessor.

The inspector may be required to attend periodic meetings with City staff at the request of the Assessor.

F. COMPENSATION

The field worker will be responsible for their own transportation/mileage associated with performing their duties as a contractor for the City.

The contractor (or firm) shall submit monthly invoices for payment which specifies the total number of inspections performed. Invoices shall be submitted to the Assessor on a timely basis and payments shall be mailed to the contractor according to an annual schedule provided by the City. A *sub-contractor* may not perform inspections or other related duties under this agreement without written approval by the Assessor.

G. INSURANCE

The field worker (or firm) shall agree to provide a certificate of insurance with the City of Mt. Pleasant named as an additional insured before commencing to perform services, and annually thereafter, for the following coverage in the amounts specified:

- A. Public Liability and Property Damage
 - 1. \$300,000 each person for bodily injury;
 - 2. \$500,000 each occurrence for bodily injury;
 - 3. \$250,000 for property damage
- B. Worker's Compensation as required by law.

III DIRECTIONS FOR SUBMITTAL

A. SUBMISSION

Individuals or firms submitting proposals shall submit two (2) copies of the proposal. These materials must be received in a sealed package at the City of Mt. Pleasant by 1:30 PM on Tuesday, June 9, 2015. Late proposals will not be accepted. Proposals shall be valid for sixty (60) days. Packages containing the proposal and any related material should be plainly marked on the outside as follows:

'ASSESSING FIELD WORK SERVICES BID'

Packages shall be delivered via mail, courier, or in person to:

Jeremy Howard, Clerk
320 West Broadway Street Mt.
Pleasant, MI 48858

B. TIMELINE

The contract period will be June, 2015 through December 31, 2015. The contract may be renewed for the year of 2016 and 2017 with a change in parcel count to a number agreed upon by the contractor and the City Assess. The exact parcel count to be agreed upon by the contractor and the City Assessor.

The contract may be terminated by either party upon sixty (60) days written notice.

The following tentative timeline has been set for the award of the contract under this RFP.

Distributed: May 20, 2015

Proposals Due: June 9, 2015

Interviews/Follow-up if needed: June 10 to June 12, 2015

Commission approval: June 22, 2015

Contract Awarded: June 23, 2015

C. COSTS FOR PROPOSAL PREPARATION

The City of Mt. Pleasant shall not be liable for any costs incurred by the individual or firm in responding to this Request for Proposal, or for any costs associated with discussions required for clarification of items related to this proposal, including any future interviews.

D. RESERVATION OF RIGHTS TO REJECT, WAIVE, AND REISSUE

The City of Mt. Pleasant reserves the right to accept or reject any and all submittals, waive any irregularities, reissue all or part of this Request for Proposal, and not award any contract, all at their discretion and without penalty.

E. OWNERSHIP OF MATERIALS

All materials, including but not limited to paper and digital materials, that are prepared, acquired, created, or utilized to fulfill this Request for Proposal and its objectives shall become the property of the City of Mt. Pleasant where permitted by law.

F. INFORMATION REQUIRED IN PROPOSAL

The proposal shall provide the following information in this order:

1. General information about the individual or firm, along with staff experience, credentials/certifications, and training.
2. A resume of the field worker that will be completing the scope of services including their assessing level certification.
3. Activity reports (*provide examples.*)
4. Contractor availability and methods of contact for the public and staff.
5. Contractor compensation and invoicing.
6. Current insurance with limits for general liability, worker's compensation, and vehicle commercial, comprehensive, and collision; or statement of intent to insure and at what limits.
7. Three or more references, including contact names, addresses, and telephone numbers.
8. Closing statement, if desired.
9. Completed and signed bid proposal form.

IV. EVALUATION PROCESS

The City of Mt. Pleasant is committed to an objective and open selection process. Every proposal shall receive an unbiased review.

The evaluation criteria include:

- Overall qualifications, experience, and competence of staff.
- Experience in projects of similar scope in communities with comparable characteristics.
- Experience in working with and involving the public.
- Reference checks.
- Availability and responsiveness to the City of Mt. Pleasant.
- Written and visual quality and accuracy of the proposal.
- Project approach.
- Interview (if conducted.)
- Costs

City of Mt. Pleasant, Michigan

BID PROPOSAL FOR CONTRACTED ASSESSING FIELD WORK SERVICES

BID ITEM: Assessing Field Work Services Bid
Contract until December 31, 2015
Contract may be renewed for 2016 and 2017

BID OPENING: Tuesday June 9, 2015 at 1:30 pm.

I. CONTRACTOR AGREES TO PROVIDE

- A. All materials and equipment necessary to perform the duties detailed in the Bid Specifications.
- B. The individual or firm agrees to meet with the City to cover areas of concern detailed under the proposal specifications and as needed to resolve an issue related to any inspection.

II. PROVISIONS

- A. I/We, the undersigned, understand that the contract may be terminated by either party upon sixty (60) days written notice
- B. I/We, the undersigned, propose to provide the services outlined in the above specifications of contracted assessing field work in City of Mt. Pleasant
- C. The City of Mt. Pleasant reserves the right to reject any or all bids, to waive any irregularities, and to select the bid most advantageous to the City of Mt. Pleasant.

III. RESPONSIBLE PARTY *(Include contact person, and telephone)*

IV. REFERENCES *(Include contact person, affiliation and telephone)*

V. BID AMOUNTS for per parcel inspections

	A Inspection Rate Per Parcel	B <u>Estimated Parcel</u>	A x B Total Estimated Inspection Costs
2015 Base Bid		130	
Alternate Bid A		215	
Alternate Bid B		430	
2015 New Construction		100	
2016 Base Bid		130	
Alternate Bid A		215	
Alternate Bid B		430	
2016 New Construction		100	

VI. CONTACT INFORMATION

Company Name (Bidder)

Mailing Address

City

State

Zip Code

Telephone Number

Cell/Mobile Number

Business Fax Number

Email Address

Authorized Signature

Date

Print or Type Name and Official Title

Appendix A

FIELD INSPECTION CHECK LIST FOR RESIDENTIAL INTERIOR INSPECTIONS

Parcel No. _____ Address _____

House/Unit: Year Built _____ Year Remodeled _____

No. of Full Baths _____ No. of Half Baths _____ No. of Bedrooms _____

Interior: Drywall _____ Plaster _____ Paneled _____

(Express at % of total interior)

Floors: Kitchen _____ Other _____

(Linoleum, Ceramic Tile, Carpet, Hardwood)

Basement Finish: Recreation _____ Living Quality _____

(Express as Square Feet of Basement Area)

Heating/Cooling: _____

(Gas; Wood; Oil; Coal; Electric; Steam)

Heating System: _____ Central Air: Yes No

(Forced Air; Hot Water; Space Heat; Heat Pump; Wall Furnace)

Bathrooms: Ceramic Tile Floors (Number) _____ Tub Alcove (Number) _____

Separate Shower (Number) _____ Extra Stool (Number) _____

Extra Lavatory (Number) _____

Built Ins (Numbers):

Oven _____ Range _____ Microwave _____

Dishwasher _____ Disposal _____ Hot Tub _____

Trash Compactor _____ Jacuzzi _____ Central Vacuum _____

Fireplace (Numbers): Foundation _____ Pre Fab _____

Free Standing Wood Stove _____

Garage: Year Built _____ Out Building Year Built _____