

TOWN OF VICTOR
REQUEST FOR PROPOSAL FOR 2020 ASSESSMENT ROLL
COMMERCIAL AND INDUSTRIAL PROPERTY

1. Purpose

The Town of Victor is soliciting sealed proposals from qualified firms (Contractor) to provide professional valuation services for the Town of Victor’s commercial and industrial properties pursuant to Sections 301 and 305 of the New York State Real Property Tax Law (RPTL) for the 2020 assessment year and as outlined in the SCOPE OF SERVICES section of this request

2. Background

The population of the Town of Victor has grown by approximately 43% over the past 10 years, exceeding 14,000 in the 2010 census, with continued evolving growth averaging 1.75% per year in new occupancy rates. The commercial business community has also grown to over 700 businesses located in this area, which includes world-wide headquarters for several corporations.

In accordance with the Town of Victor’s Cyclical Reassessment Plan, filed with the New York State Office of Real Property Tax Services (ORPTS), the Town last completed a town wide revaluation in 2015. The next revaluation is planned for 2019. The Town of Victor equalization rate for the 2017 assessment year was 100%.

<u>2017 Assessed Values</u>	<u>Total Assessment</u>	<u>Parcel Count</u>
Commercial Properties	\$462,926,087	455

A summary breakdown of the commercial and industrial properties is included in Appendix A.

3. Scope of Services

The Contractor will agree to perform the following assessment valuation services as required for all Town of Victor commercial and industrial properties that will appear on the 2020 assessment roll, with the exception of the properties stated in paragraph 1 below. The Contractor must have a working knowledge of RPS V4 Commercial/Industrial Valuation Module. The valuation shall be in conformance with the New York State Board’s Rules, as specified in The New York State Rules and Regulations for Real Property Tax Administration which established standards of certification for State financial reimbursement (9NYCRR). The State Board’s Rules that must be adhered to will be those which are in force as of the date of contract execution. It is the intent of the Town to complete the reassessment in accordance with Section 1573 RPTL rules and procedures in order to qualify for State assistance. The valuation date will be July 1, 2019.

1. The following property(ies) will not be included within the Scope of Services:

- Tax account number 6.00-1-12.100, Eastview Mall, LLC, 100-1020 Eastview Mall Drive, which includes the main mall area and satellite buildings that house LL Bean, Raymour & Flannigan, Ethan Allen, Citizens Bank, Champps and PF Changs. HOWEVER, all anchor stores will be valued, which includes JC Penney, Sears, Lord & Taylor, Macys and Von Maur;
2. Market Data Analysis: Contractor shall analyze all property sales and when possible use the market approach to value to establish an assessed value. When property sales are available, the income approach to value and cost approach to value shall be used to support the market approach. Contractor will supply the Assessor with any needed extract files to be applied to the Town's RPS master file;
 3. Income Data Analysis and RPS Valuation Factor File (VFF) Update: Contractor shall analyze current commercial leases, trends, vacancy, and gross rent multiplier and capitalization rates. Contractor shall update or, as needed, build a new VFF with current rates and assign the proper RPS "set code" for each Used-As-Code. The income approach to value shall be used to support the market approach to value when possible. If there are not enough sales to utilize the market approach, the income approach to value may be used. Contractor will supply the Assessor with any needed extract files to be applied to the Town's RPS master file;
 4. Cost Data Analysis: Contractor will review the cost approach and develop any needed depreciation tables to value any property that cannot be valued using the market or income approach. All cost approach factors and depreciation tables are to be applied to RPS. Contractor shall provide the cost ratio, PRD and COD of the final table of the past 3 sales years to the Assessor. Contractor will supply the Assessor with any needed extract files to be applied to the Town's RPS master file;
 5. Land Tables: Contractor will build a new set of commercial land tables which will include land pricing estimates for all land types (01 thru 15) for each commercial neighborhood. Table values are to be based on a combination of land sales and land/bldg ratios by neighborhood;
 6. RPS Commercial Valuation Module shall be used to run all preliminary and final assessments unless, after analysis, the Cost Approach is required. A final valuation sheet that matches the valuation approach used, Commercial Market Income sheet or Cost Approach sheet, shall be printed for each property. The final valuation sheet will show the 2020 assessed value and be provided to the Assessor. Contractor will also update and apply updated Project Table(s) as needed;
 7. Sales Verification: Contractor shall field check and verify all commercial/industrial sales and any questionable sales data prior to being used for valuation analysis;
 8. Contractor must field review each property. This review may be done by physically visiting the property and viewing the property from the roadway or by the use of

Pictometry to view all improvements. If new improvements have been constructed since the latest Pictometry image, the Contractor must physically visit the property.

9. Provide the Assessment Office with statistical reports, sales analysis, and valuation process to support the approach to value used to establish assessment values;
10. Assessment change notices shall be mailed no later than March 1, 2020. Contractor shall assist in the preparation of an assessment change notice for each property whose assessment is increasing from the prior assessment year, with a total list of changes, increases and decreases, to the Town Assessor;
11. Contractor shall conduct informal assessment reviews with taxpayers for up to six days and for a minimum of eight hours per day. Informal assessment review hours shall be accessible to the majority of the business public. Informal assessment reviews shall start two weeks after the mailing of the assessment change notices.
12. All Tentative assessment values shall be completed and entered onto the assessment roll in time for a copy of the Town's assessment file to be transmitted to the Ontario County Real Property Tax Services on April 8, 2020;
13. Attend and defend commercial and industrial assessed values at the Board of Assessment Review (BAR) meeting on the fourth Tuesday of May 2020 and/or any adjourned BAR hearing date(s). The Town will endeavor to set all adjourned hearings within a two week time period following the fourth Tuesday of May 2020;
14. All Final assessment values shall be completed and entered onto the assessment roll in time for a copy of the Town's assessment file to be transmitted to the Ontario County Real Property Tax Services on June 17, 2020;
15. Accurately maintain and update the existing filing system and all necessary records and documents;
16. Prepare and submit all required forms to the Town of Victor Assessor, including all final reports;
17. Maintain a local telephone number, email account, and website with contact information during the contract period;
18. Respond within five business days to any written inquiry by the Town of Victor Assessor;
19. Provide the Town with monthly progress reports and provide Town staff with access to the firm's electronic data management software, if applicable.

20. If the selected Contractor subcontracts with other individual(s) or firm(s) to complete any item(s) identified in the "Scope of Services," the qualifications of those individual(s) and firm(s) must be included in the proposal;
21. If the selected Contractor does not include details about a subcontractor(s) in the proposal, but determines a subcontractor(s) is necessary to complete the necessary tasks pursuant to the executed contract, during the valuation and assessment process, the Town shall have the right to review the qualifications and approve the use of the subcontractor(s) before the subcontractor's services are utilized to complete the tasks of the contract;
22. Contractor will provide up to 3 work-days (on site, if requested) to the Assessor for any needed assistance for items not covered above.
23. Any and all tables, models and/or files developed for RPS are the property of the Town of Victor Assessment Office. Further, all reports, property review data, research documents, maps, notes and work papers are the property of the Town of Victor Assessment Office.
24. If requested by the Town, Contractor shall provide expert trial testimony at any certiorari trial resulting from any certiorari filed as a result of the 2020 assessment roll.

4. Summary of Assessment Timeline

- Start date of project no later than July 1, 2019
- Assessment change notices shall be mailed no later than March 1, 2020
- Conduct informal assessment reviews: Approximately March 16 – 21, 2020
- Assessment file to the Ontario County Real Property Tax Service for Tentative Roll processing on or about April 8, 2020
- Completion of the assessment roll for filing of the Tentative Assessment Roll on May 1, 2020
- Board of Assessment Review meeting on the fourth Tuesday of May, 2020
- Assessment file to the Ontario County Real Property Tax Services for Final Roll processing on or about June 17, 2020
- Completion of the assessment roll for filing of the Final Assessment Roll on July 1, 2020.

5. Responsibility of Town /Assessor

Assessment Functions: all, normal assessment functions including, but not limited to, timely updating of splits, combinations, posting of sales, data entry, clerical updating of RPS files, etc.;

Hardware/Software: the Town of Victor Assessment Office will allow the use of its computer and access to the files on its network necessary to complete the updates and analysis;

Advisory Appraisals: the Assessor will request advisory appraisals for utility properties from ORPTS. Should ORPTS not be able to provide the appropriate appraisals, or they are not requested, then utility values will be the responsibility of the Town's Assessment Office.

Miscellaneous Costs: All miscellaneous costs such as public relations materials, change of assessment notices, postage and envelopes for any required mailings, etc. will be the responsibility of the Town.

6. Responsibility of ORPTS

Utility values - Assessor needs to request from ORPTS.

Standards and guidelines for cyclical reassessment.

On-going review of procedures and documentation to assure compliance with reimbursement

7. Terms of Agreement

It is intended that this agreement will be for the duration of valuation project, with a starting date no later than July 1, 2019. The agreement for services may be terminated by either party by thirty (30) days written notice. The agreement will provide for the Contractor providing monthly written progress reports to the Town Assessor. The agreement is non-exclusive and allows the Town to obtain valuation services from other providers if, for any given project, it determines such services to be necessary.

8. 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.

9. 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 or a not-to-exceed fee for the entire valuation project. 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.

Certiorari trial expert testimony shall be based on an hourly fee schedule.

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.

10. Qualifications

Expertise of the firm shall be demonstrated by proof of past contract 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 be fully satisfactory to ORPTS to complete the valuation and assessment service.

Proposals must include the following qualification details:

1. The size of the firm;
2. 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;
3. Three references from municipalities of similar population. The references must include contact name, municipality name, address, telephone number, and email address;
4. Description of capabilities to convert property data to an electronic format;
5. 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.

11. 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 Victor.

12. Selection Process

All submitted proposals will be reviewed by the Town Assessor, and will be evaluated with regards to qualifications, municipal experience, and pricing of services. The Town Assessor may elect to interview select candidates in order to determine the firm which will provide the best services for the Town of Victor. The Town Assessor 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.

13. 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.

14. Questions

Inquiries may be directed to the Town Assessor, Wayne Pickering, IAO, wbpickering@town-victor-ny.us or (585) 742-5011.

15. Proposal Requirements

1. Name, email and telephone number of person(s) to be contacted for further information.
2. A list of all personnel who will be involved with the valuation, including their years of experience, qualifications, and proof of certification.
3. Listing of all valuations 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.
4. If selected, the contractor will be required to provide proof of liability professional insurance and Workers Compensation Insurance, as stated above.

16. Proposal Submission Information

Submission Date and Time: By Friday, October 13, 2017 at 12:00 Noon

Ten (10) hard copies of all proposals, which includes one (1) original and nine (9) copy to:

Town of Victor
Town Clerk Office
85 East Main Street
Victor, NY 14564

Clearly mark the submittal with the title “TOWN OF VICTOR VALUATION / ASSESSOR RFP” 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.

17. Proposal Process Schedule

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

<u>Event</u>	<u>Date</u>	<u>Time</u>
Issuance of RFP -----	9/13/17 -----	N/A
Receipt of inquiries from Contractors no later than -----	10/02/17 -----	4:30 PM
Receipt of Sealed Proposals -----	by 10/13/17 -----	@ 12:00 Noon
Conduct Company Interviews Week of (if the Town determines interviews are needed) -----	10/30/17 -----	N/A
Announcement of Most Responsive Bidder -	11/13/17 -----	N/A

APPENDIX A

2017 Commercial / Industrial Property Breakdown		
Property Class	Count	Total Assessment
300 – Commercial / Industrial Vacant Land	115	16,926,800
331 and 341 – Commercial / Industrial Vacant Land w/ Improvement(s)	13	3,931,000
400 - Commercial	255	355,096,828
500 - Recreation	15	20,268,000
600 - Community Service	4	1,004,000
700 - Industrial	48	64,174,459
800 - Public Service	5	1,525,000
Total	455	462,926,087