

Request for Proposals  
Assessing Services and Cyclical Measure & List  
Moultonborough, NH  
August 29, 2013



Joel R. Mudgett, Chairman  
Board of Selectmen

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**TOWN OF MOULTONBOROUGH**  
**Request for Proposals**  
**Assessing Services and Cyclical Measure & List**

Sealed proposals for Assessing Services and Cyclical Measure & List for the period of January 1, 2014 through December 30, 2017 will be received until 2:00 p.m. on August 29, 2013 in the Offices of the SelectBoard, 6 Holland Street, PO Box 139, Moultonborough, NH 03254 at which time they will be opened and publicly read aloud. Your proposal must be marked with the project, item or service being sought, and the date the proposals are due. If you send your proposal by mail you should put it into a separate sealed envelope, marked as required, inside the mailing envelope to safeguard against it being opened in error. Any proposals received after the specified date will be rejected and returned unopened.

The work includes an annual (a) statistical update of values, (b) measure and list of building permits, (c) measure and list of sales, (d) informal citizen hearings on proposed values, (e) cyclical measure and list, and (f) representation at the Board of Tax and Land Appeal Hearings and/or Superior Court. The annual value is anticipated to be \$70,000+/- . Annual renewal of the contract will be dependent upon appropriation by the Town and satisfactory performance by the contracted firm.

A detailed package with information on the program and all specifications, the conditions thereof, and bid forms, is available at [www.moultonboroughnh.gov](http://www.moultonboroughnh.gov) (click on Paid, Volunteer and Contract Openings) or said offices during normal business hours.

A pre-proposal conference will be held at 10:00 a.m. on August 20, 2013 at Moultonborough Town Hall. Any questions with respect to this invitation must be received, in writing by mail (above address), fax (603.476.5835) or email ([cterenzini@moultonboroughnh.gov](mailto:cterenzini@moultonboroughnh.gov)), by Carter Terenzini, Town Administrator, no later than 4:00 p.m. on August 22, 2013. **It is the bidder's responsibility to view and account for any addendums relating to this request. These will be posted on the Town web site no later than 4:00 p.m. on August 26, 2013.**

The contract will be awarded on the basis of the proposal deemed most advantageous to the Town. The Town reserves the right to reject any and all bids, and waive any minor or non-material informalities, if deemed to be in its best interests.

/s/ Joel R. Mudgett, Chairman  
Board of Selectmen

Posted: Town Bulletin Boards (7) & SAU  
Advertised: Meredith News 08/01/13 & 08/08/13 & Union Leader 08/01/13  
Mailed: Town Clerk, Public Agencies w/in 45 minute radius; Vendors List  
Web: Craigslist; [winnipesaukee.com](http://winnipesaukee.com); NHLGC

## Scope of Work or Specifications and Conditions

### 1) General Background

The Town of Moultonborough has 7,390 parcels of land to assess. These are classified as follows:

5,042 residential improved	1,206 residential vacant
194 condominiums	234 mobile home
2 apartment buildings	139 commercial & industrial improved
50 commercial and industrials vacant	386 exempt
137 current use parcels	

There are also 16 utility parcels not included as part of this bid. The total assessed value of the town is \$2,853,773,399. The Town of Moultonborough is presently undergoing the 2013 Assessment Review with the New Hampshire Department of Revenue. It has undergone an annual statistical update over each of the past ten (10) years. Our last full measure and list was in 2004. We are in the second year - and on track - of a five-year process to measure and list properties in every five-year cycle. We currently use the VISION CAMA software. It is our intent to continue to use this software. The Town will only entertain a switch to a different software system if it proves to be cost effective over the life of the contract.

Over each of the past two (2) years we have averaged 100 qualified sales, 250 building permits, and 750 cyclical measure and list assignments. It is your responsibility to project and include in your base pricing the number of qualified sales you might anticipate. In evaluating your proposal we shall use the average numbers for building permits and cyclical measure and list to come to a bottom line pricing for comparison purposes. Should building permits vary from the average, it is anticipated that the contract will be rebalanced with more or fewer cyclical measure and list parcels to balance the contract out overall at the anticipated total annual cost.

### 2) Term of Contract & Estimated Value

The Town will enter into a four-year contract to run from January 1, 2014 through December 30, 2017. The contract will contain a clause that allows the Town to terminate it annually with sixty (60) days' notice if performance by the contracted firm is not satisfactory or the Town Meeting fails to appropriate funding. Annual renewal of the contract will be dependent upon appropriation by the Town and satisfactory performance. The annual value is anticipated to be \$70,000+/-.

### 3) General Scope of Work

The general scope of work includes an annual (a) statistical update of values, (b) measure and list of building permits, (c) measure and list of sales, (d) informal citizen hearings on proposed value, (e) cyclical measure and list, and (f) representation at the Board of Tax and Land Appeal Hearings and/or Superior Court.

#### 4) Specific Scope of Work

The contracted firm will complete the following work in accordance with the best practices of the profession:

- 1) Perform an annual statistical update of values for the purpose of updating values to be compliant with RSA 75:8 and balance values to assure equity and fairness in the overall assessments;
- 2) Measure and list all properties that have sold during the contract period and investigate and verify the circumstances surrounding all sales (to be completed by April 15);
- 3) Measure, list, and value of new or newly modified properties as a result of the issuance of permits, or any other applicable source (pick-ups) (to be completed by April 15);
- 4) Carry out a systematic measure and list of a portion of town properties each year including, but not limited to, the exterior measurement of all principle buildings. [Note: When the taxpayer is not at the residence, the Contractor shall measure the exterior and estimate the features of the building using the best available evidence. Contractor shall attempt interior inspections during the summer after notifying all property owners in writing and requesting interior inspections by appointment. In all cases of entry, the property owner or occupant shall be at least eighteen (18) years of age or the appraiser shall not enter to perform the inspection;
- 5) Input all data changes and/or corrections from the statistical update, sales analysis, permit inspections and measure and list of properties in Town;
- 6) Mail out statements of proposed values and year-to-year changes to all taxpayers (to be completed by July 15) and conduct informal citizen hearings on proposed values (to be completed by August 15);
- 7) Finalize and submit to the Town final values (to be completed by August 20 and subject to a \$100 per day liquidated damages for every day of delay thereafter);
- 8) Prepare, submit, respond to requests for information, and obtain approval of the New Hampshire Department of Revenue Administration (DRA) of a USPAP compliant report which addresses how the statistical update for each year was undertaken and completed;
- 9) Meet with the Town Administrator, Board of Selectmen and/or Town Assessor upon request;
- 10) Meet and work with the Town Assessor and Department of Revenue Appraiser to ensure that the Town of Moultonborough is meeting all Assessment Review guidelines as stipulated by the New Hampshire Assessing Standards Board and to maintain a good working relationship; and
- 11) Represent the Town and/or testify in hearings before the Board of Tax and Land Appeals and/or Superior Court.

**5) Minimum Personnel Standards**

The selected Contractor must be DRA certified for this work. All personnel working on the statistical update in the Town of Moultonborough shall be DRA certified in the grading, classifying and appraising of all property covered by this contract. The Project Manager must be DRA certified as a Property Assessor Supervisor as outlined in ASB 304.04. All necessary field assistants shall hold the Measurer and Lister Certification by DRA. All personnel must have undergone criminal background checks satisfactory to the Town. Changes in the Project Manager must be approved by the Town (not to be unreasonably withheld).

**6) Minimum Insurance Standards**

Prior to commencing work, and throughout the term of this Contract, the Contractor shall obtain, maintain and provide to the Town a copy of the certificate, in the limits and under the conditions set forth below, insurance coverage for the following types and levels of coverage:

- i. Workers Compensation: Statutory
- ii. Automobile and Equipment: \$1 Million/\$2 Million
- iii. Property Damage: \$1 Million/\$2 Million
- iv. General Liability: \$1 Million/\$2 Million
- v. Errors and Omissions \$1 Million combined single limit.

Each policy of insurance shall be issued by a financially secure insurer, duly licensed to do business in the State of New Hampshire. The Town shall be named as certificate holder and shall be included along with officers, employees and agents as named additional insured. The Town shall be notified no earlier than thirty (30) days before any such policy is cancelled, altered or materially changed. If a subcontractor or sub-consultant is used for any portion of the work, the Contractor will provide to the Town a similar certificate, in similar amounts and under similar conditions, from the subcontractor.

Should the Contractor fail to maintain such Workers' Compensation insurance, and should the Town be found liable to principals, officers, employees and agents of the Contractor, the Town may recover from the Contractor the amount of any medical costs and compensation paid to or on behalf of the principals, officers, employees and agents of the Contractor and any expenses relating to claims filed under the provisions of Workers' Compensation.

**7) Status of Contractor & Support by Town**

The Contractor shall be compensated as an independent Contractor and shall be responsible for providing FICA, Workmen's Compensation, Unemployment Compensation & Liability to all employees assigned to the Town of Moultonborough and providing proof thereof.

The Town will provide office space with a desk, phone, photocopier and computer with access to the VISION CAMA system at the Town Offices while they are in Town doing their field work. This is support space and is not intended to be the primary offices for the Contractor.

## 8) Pricing to Be All Inclusive

The successful bidder will provide support staff to inspect all real estate transfers as reported by the Registry of Deeds, input any changes to property record cards, inspect and input all building permit pick-ups issued into the assessing system. The Contractor's pricing shall be inclusive of all costs of personnel, mailing, office support, reproduction, communications, mileage, travel per diems, profit and overhead and the like.

## 9) Pre-Proposal Briefing and Submission Due Date

**A pre-proposal conference will be held at 10:00 a.m. on August 20, 2013** at the Moultonborough Town Hall. Any questions, with respect to this invitation, must be received, in writing by mail, to 6 Holland Street, P. O. Box 139, Moultonborough, NH 03254, fax (603.476.5835) or email ([cterenzini@moultonboroughnh.gov](mailto:cterenzini@moultonboroughnh.gov)), by Carter Terenzini, Town Administrator, no later than 4:00 p.m. on August 22, 2013. **It is the bidder's responsibility to view and account for any addendums relating to this request. These will be posted on the Town web site no later than 4:00 p.m. on August 26, 2013.**

Sealed proposals will be received **on the form prescribed by the Town** until 2:00 p.m. on August 29, 2013 in the Offices of the SelectBoard, 6 Holland Street, PO Box 139, Moultonborough, NH 03254 at which time they will be opened and publicly read aloud. Your proposal must be marked with the project, item or service being sought, and the date the proposals are due. If you send your proposal by mail, you should put it into a separate sealed envelope, marked as required, inside the mailing envelope to safeguard against it being opened in error. Any proposals received after the specified date will be rejected and returned unopened.

## 10) Proposal Withdrawal

No proposal may be withdrawn after it is filed unless the Contractor makes a request in writing to the Town prior to the time and date set for the opening of proposals or unless the Town fails to award or issue a notice of intent to award a Contract within sixty (60) days after the date and time set for opening proposals.

## 11) Evaluation of Proposals

Evaluation of the responses will be based on the extent to which the response meets the requirements of the solicitation and the Town's determination as to the extent to which the respondent is likely to be able to achieve the desired results and fulfill the purposes of the solicitation. Proposers are welcome to submit supporting information or references, demonstrating how they have shown their performance to be in terms of quality and timeliness in tasks performed for other clients or the Town of Moultonborough and how responsive they will be in terms of cost efficiency to the Town of Moultonborough.

Firms shall be given added points if they can demonstrate substantial added value such as:

- An ability to exhibit a substantial degree of familiarity with waterfront and seasonal recreation communities;

- A program or process to allow taxpayers to review their property record card and electronically notify the town of changes they believe need to be made to the record;
- A formal firm-wide Quality Assurance and Control program.

Upon the initial evaluation of the proposals, the top three ranked firms shall make a formal presentation to the Town. **These presentations are scheduled for September 18, 2013.** You will be given at least seventy-two (72) hours of advance notice if you are to make such a presentation. Upon the completion of this process, the Town shall make a final ranking of firms for submission to the SelectBoard for their review and action.

## 12) Contract Negotiations

Upon authorization by the SelectBoard, the preferred Contractor will be notified of their status and the Town shall endeavor to negotiate a contract. If such negotiations are not successful, the Town shall proceed to the next firm and so forth until the Town has agreed a contract with a firm. The final contract shall be subject to the review and recommendations made by DRA.

## 13) Anticipated Timeline

Mailings & Web Postings	July 31, 2013
1 <sup>st</sup> Advertising	August 1, 2013
2 <sup>nd</sup> Advertisement	August 8, 2013
Pre-Proposal Conference	August 20, 2013
Final Date to Submit Questions in Writing	August 22, 2013
Addendums Posted on Web Site	August 26, 2013
Bids Due	August 29, 2013
Review & Analysis	September 11, 2013
Interviews of Preferred Firms	September 18, 2013
To BoS for Review and Action	September 19, 2013
Commence Negotiations with Preferred Contractor	September 25, 2013
Complete Contract for Submission to DRA	October 30, 2013
Commence Services	January 1, 2014

**Town of Moultonborough**  
**Assessing Services and Cyclical Measure & List**  
**Proposal Form**  
**(Please Print in Ink or Type)**

Proposer Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Contact Person: \_\_\_\_\_

\_\_\_\_\_  
Telephone Fax

\_\_\_\_\_  
Email

ATTENTION: Mr. Joel R. Mudgett, Chairman  
Board of Selectmen  
PO Box 139  
Moultonborough, NH 03254

Dear Mr. Mudgett:

Having examined the documentation provided with the subject Request for Proposals, the undersigned proposes to furnish the requested item or materials as requested in accordance with the subject documents.

The undersigned acknowledges Addenda # \_\_\_\_\_  
(If none, write none).

If I am notified my proposal is accepted within sixty (60) days of the bids having been opened, I will execute a contract for the work within fourteen (14) days thereafter.

I propose to perform the specified work for the following unit pricing per year:

- >
- >
- >
- >
- >
- >

**Item**

**Price**

**1) Annual Statistical Update** (Inclusive of all services such as annual sales review and analysis, informal hearings and USPAP Report)

\$ \_\_\_\_\_  
(Figures)

\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

**2) Cyclical Measure and List** (per parcel)  
(inclusive of follow up letter)

\$ \_\_\_\_\_  
(Figures)

\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

**2A) Cyclical Measure and List**

Per Parcel Price \$ \_\_\_\_\_ X 750 parcels =

\$ \_\_\_\_\_  
(Figures)

\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

**3) New Construction Pick Up** (per parcel)  
(inclusive of new and unfinished construction)

\$ \_\_\_\_\_  
(Figures)

\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

**3A) New Construction Pick-Up**

Per Parcel Price \$ \_\_\_\_\_ Times 250 parcels

\$ \_\_\_\_\_  
(Figures)

\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

4) Additional Assessing Services (inclusive of any BTLA or Superior Court Hearings) \$ \_\_\_\_\_  
(Figures)  
\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

**Fully Extended Total (Items 1, 2A and 3A)** \$ \_\_\_\_\_  
(Figures)  
\_\_\_\_\_ Dollars and \_\_\_\_\_ Cents.  
(Words)

I understand that the town reserves the right to reject any and all bids, and waive any minor or non-material informalities, if deemed to be in its best interests.

I understand that the Town may hold my bid for sixty (60) days prior to awarding a contract.

In order to be considered responsive, each bidder must submit the following with this bid:

- 1) History of Firm and reference list for at least five (5) similar projects completed within the past three (3) years as specified;
- 2) Resumes for Project Supervisor and Field Personnel;
- 3) Description of Project Approach and Value Added Services; and
- 4) Clerk’s Certificate showing the authority of the submitting party to bind the proposer to a contract.

I certify, under the penalties of perjury, that (1) I have had an opportunity to view the full bid package and am aware it was my responsibility to perform my own due diligence appropriate to submitting this proposal, (2) I am fully authorized to submit this bid, (3) I have not engaged in discussions, negotiations, or collusion with any person to determine what my bid will be and (4) that I, to the best of my knowledge and belief, have paid all taxes, fees, assessments, betterments or other municipal charges that I owe to the Town of Moultonborough or have payment agreement in place or have filed an appeal over the same.

\_\_\_\_\_  
Signature of Authorized Agent

Corporate Seal

\_\_\_\_\_  
Title of Proposer

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

**CLERK'S CERTIFICATE**

At a duly authorized meeting of the Board of Directors of \_\_\_\_\_ was held on \_\_\_\_\_ at which a suitable majority voted that \_\_\_\_\_ (name), the \_\_\_\_\_ (title) of this Company, be and he/she hereby is authorized to submit bids, execute contracts and bonds in the name and behalf of said Company, and affix its corporate seal thereto and such execution of any bid, contract or obligation in this Company's name on its behalf by such person under seal of the Company, shall be valid and binding upon this Company.

A true copy,

ATTEST: \_\_\_\_\_  
Clerk's Signature

\_\_\_\_\_  
Typed or Printed Name of Clerk

Place of Business: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date of this Contract: \_\_\_\_\_

I hereby certify that I am the Clerk of \_\_\_\_\_ and that \_\_\_\_\_ is the duly elected or appointed \_\_\_\_\_ of said Company, and that the above vote has not been amended or rescinded and shall remain in full force and effect as of the date of this bid submission and/or contract execution.

\_\_\_\_\_  
Clerk's Signature

Corporate Seal

**Or**  
**DIRECT CONSENT**

The undersigned, being all the Directors of \_\_\_\_\_, a  
\_\_\_\_\_ (state) (the "Corporation"), hereby consent to and authorized the  
following actions by the Corporation:

RESOLVED: That the Corporation shall provide a bid and enter into a certain contract with the  
Town of Moultonborough, NH for the services of \_\_\_\_\_  
\_\_\_\_\_.

RESOLVED: That \_\_\_\_\_ (name)  
\_\_\_\_\_ (title) of the Corporation, is  
authorized and directed to execute on behalf of the Corporation the foregoing bid, contract and  
other documents of any kind or nature necessary to effect the purposes of this preceding  
resolution.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Title