



SAUGATUCK TOWNSHIP
REQUEST FOR PROPOSALS
ASSESSING SERVICES

Saugatuck Township will receive Request for Proposals for Assessing Services according to the following specifications.

Proposal Submission

A total of one (1) digital copy must be received no later than **12:00pm on May 31, 2022**. Proposals received after this deadline will not be considered, Proposals shall remain in effect until July 31, 2022. All costs incurred for preparation, presentation, or contract negotiations are the responsibility of the Consultant. The Township reserves the right to reject any or all proposals submitted in response to this request for proposals and/or to select the proposal that it determines, in its sole judgment, to best meet the needs of the Township. To be considered, proposals should include the information specified below and must be received by the due at the following address:

Daniel DeFranco, Township Manager
Saugatuck Township
3461 Blue Star Highway
PO Box 100
Saugatuck, MI 49453

Questions regarding this RFP should be submitted via email to the Manager at ddefranco@saugatucktownship.org by 3:00pm May 31, 2022.

ENVELOPES/SHIPPING BOXES MUST BE PLAINLY MARKED:

“ASSESSING SERVICES – PROPOSAL”

AND MUST BEAR THE NAME OF THE PROPOSER.

Daniel DeFranco
Township Manager

Notice dated: May 4, 2022

SAUGATUCK TOWNSHIP
REQUEST FOR PROPOSALS
ASSESSING SERVICES

IMPORTANT DATES:

RFQ Issue Date	May 4, 2022
Last Date for Questions	May 23, 2022
Response Due Date	Tuesday, May 31, 2021 by 12:00 P.M. (Noon)
Tentative Interview Date	TBD (if applicable)

PART 1 GENERAL INSTRUCTIONS

Qualified assessing firms are invited to submit proposals to Saugatuck Township for Assessing Services.

To be considered by the Township, one (1) UNBOUND original and/or one (1) digital copy of the proposal must be received by the date and time specified. A late submission will not be considered.

Submitted copies become the property of the Township and shall not be returned.

Saugatuck Township shall not be responsible for any cost associated with the preparation of a response to this RFP. Firms are encouraged to provide the minimum amount of information necessary to address the RFP.

Anticipated service agreement will be for three (3) year duration.

PART 2 COMMUNITY / POSITION HISTORY

Saugatuck is a full-service Township of approximately 3,500 people located on the shores of Lake Michigan in Southwest Michigan. Saugatuck is a General Law Township under Michigan State Law. The Township Board, which governs the Township, is made up of a Supervisor, Clerk, Treasurer and two Trustee members; each have one vote on the Township Board and each serve four year concurrent terms. The Township Manager reports to the Township Board and is responsible for managing the day to day operations of the Township.

The Township employs approximately 4 full time and 3 part time employees.

Police protection is provided by the Allegan County Sheriff and fire protection is provided by the Saugatuck Township Fire District, a regional fire authority that services Saugatuck Township, the City of Saugatuck, and the City of Douglas.

The total 2022 budget for the Township is \$2,230,716.00, with the General fund budget at \$954,710.00. The Assessor's office is currently operated on a contract basis with the Assessor available for 3 office hours per week, and offsite availability Monday through Friday from 8 AM to 4 PM. The Township employs one full-time assistant for administrative support.

The Township has a mix of agricultural, commercial, industrial, and residential properties which are shown on the attached tax roll summary statement identified as Exhibit 1. These classifications include two (2) golf courses and a substantial amount of lakefront and riverfront property, with a total of 3,011 parcels and 126 count of personal property.

Saugatuck Township maintains file cards for each real parcel within the Township. This information includes dimensions of the parcel and any structure that is pertinent to assessment administration. The Township utilizes BS&A software, with remote access capability, to administer the assessment function on behalf of its citizenry.

The Township requires that the Contractor have experience with the following items in a community of comparable size: special assessment rolls, personal property tax statements.

PART 3 STATEMENT OF QUALIFICATIONS

Saugatuck Township is requesting proposals from qualified firms for complete contract operation of the Assessor's office. Prospective proponents must demonstrate their capabilities and experience by addressing the following areas:

1. Submit complete proposals based upon this request for proposals.

2. Submit a list of current municipal clients and services provided to each jurisdiction.
3. Submit a list of at least three municipal references from the above referenced list including telephone numbers.
4. Submit resumes of persons who will fulfill contact obligations including relevant work history.
5. Indicate how the Township Assessor's Office will be operated, by whom and with what technical backgrounds, include evidence of ability to comply with State Tax Commission requirements for assessment administration.
6. Provide a date of proposed contract initiation.
7. Provide at the Township's request, a performance bond for the value of the first year of the proposed contract.
8. Discuss any other topics or areas that are relevant to the firms' qualifications.

Part 4 Scope of Service

The scope of services contained in the proposal shall provide for total contract operation and will include, but is not limited to, the following:

1. Serve as department head for the Township Assessor's Office.
2. Assume responsibility for all reports, notices and permits required by the Federal, State and local agencies including provision of regular informational reports to the Township.
3. Assume all costs for any fines or penalties levied against the Township for improper administration and operation of the Township Assessor's Office.
4. Maintain the current high standard of physical appearance of the Assessor's Office.
5. Serve as the Townships liaison and representative in all matters related to administration and operation of the Assessor's Office including regulatory agencies and local governments.
6. Assist with land division and combination requests, reviewing the number of splits available and coordinating with the County and relevant local authorities.
7. Maintain parcel maps.
8. Review building permits and update property records as necessary.
9. Prepare and certify of the annual assessment roll.
10. Complete personal property statements.
11. Attend all Board of Review sessions.
12. Provide the services of a State of Michigan certified MAAO (level III) or level II working towards level III.
13. Prefer assessor in the Township Hall for three (3) hours per week, on average, but flexible to alternative arrangements. Be available at other times by appointment.
14. Complete special projects as assigned by the Township Management.
15. Use best efforts to complete site inspection and reappraisal of at least twenty percent (20%) of the parcels within the township each year.
16. Answer inquiries from the public and address pertinent issues in a timely and responsive manner.
17. Analyze sales data to update ECF's, locally derived costs and land values annually.
18. Maintain and or develop land value maps as appropriate. Maintain front foot values for

- platted, residential, commercial and industrial parcels.
17. Provide all files, computer generated or otherwise, created in the performance of this agreement upon termination of the agreement
 18. Provide copies of pertinent communications generated in the performance of the Assessor's duties to the Township on a regular basis.
 19. Prepare annual assessments for each parcel using appropriate appraisal and valuation methods as approved by the State Tax Commission.
 20. Add new construction and remove all losses from the assessment roll annually.
 21. Defend all assessments and provide necessary support/documentation in Michigan Tax Tribunal proceedings.
 22. Provide any other service or activity which would normally be accomplished in performing assessment administration in a professional manner.
 23. Enter data into the "BS&A" computer software program for all parcels in the Township as necessary to maintain accurate and complete records and assessments.
 24. Enter data into "Apex" computer software program to produce drawings as necessary to maintain accurate and complete records and assessments.
 25. Provide necessary support to the Treasurer in the creation of each Tax Year's database and rolls including review of millage information and review of final tax bills.
 26. Update parcel information such as billing address and ownership changes and ensure successful exports to the Tax database.
 27. Provide for insurance coverage for general and public liability, property damage, workmen's compensation insurance per requirements of the State of Michigan and professional liabilities errors and omissions. Saugatuck Township is to be named as an additional insured on all policies and granted indemnification by the proponent from any suits, actions, legal proceedings, claims, demands, damages, costs, expenses and attorney fees arising out of a willful or negligent act or omission of the proponent or its officers agents and employees.

At a minimum, the following type of insurance will be provided in at least the limits specified below:

<u>Coverages</u>	<u>Limits of Liability</u>
Workmen's Compensation	Statutory
Professional Errors & Omissions	\$1,000,000 each occurrence
Automobile Property Damage	\$1,000,000 each occurrence
Automobile Bodily Injury	\$1,000,000 each person
General Liability	\$1,000,000 each occurrence
Bodily Injury Liability	\$1,000,000 each occurrence
Excess Umbrella Liability	\$1,000,000 each occurrence

Any deviation from the insurance coverage set forth above must be expressly

approved by the Township in writing.

Part 5 OTHER

- a. Provide any other information necessary to fully describe services and qualifications (not to exceed 10 pages). The total number of pages in the submittal shall not exceed forty (40). Economy of preparation and brevity are encouraged.
- b. Discuss in detail what activities/items the Township will be responsible for under your proposal.
- c. Provide the name of the firms' chief administrative representative, the address of the main office and the name and address of the person(s) directly responsible for contract administration.
- d. Provide a cost proposal utilizing the attached proposal forms including the signature of a person authorized to legally bind the proponent.

Part 6 REVIEW PROCESS

Saugatuck Township reserves the right to reject any or all submittals. The Township may request one or more firms to provide a more detailed proposal. This is not a bidding process.

Part 7 EVALUATION CRITERIA

The following will be considered in the selection of a consultant:

- a. Relevant Experience
- b. Qualifications
- c. Understanding of Township Needs and Issues and familiarity with Saugatuck Township
- d. Team compatibility, including ability of contractor to work with Township staff and elected officials based on references and other supporting information.
- e. The professional reputation of the contractor and their employees.
- f. Cost of service as set forth on proposal form.

Part 8 CONFLICT OF INTEREST STATEMENT

- a. Indicate whether your company currently contracts with, or has contracted with in the past, any client whereby that relationship may conflict with your ability to provide assessing services to Saugatuck Township.
- b. Indicate whether you currently contract with any other local units of government having jurisdiction within, or contiguous to Saugatuck Township.
- c. Indicate what procedures your company would utilize to identify and resolve conflicts of interest.

SELECTION PROCESS/PROPOSAL EVALUATION & CONTRACT AWARD

The Township intends to award a contract to the proponent(s) best qualified to perform the work for the Township; experience, qualifications, cost of service and other factors considered. Saugatuck Township reserves the right to reject any and all proposals, to waive irregularities and informalities, to request additional information from all respondents. In submitting this proposal it is understood that Saugatuck Township will require a successful proponent to enter into a contract document which must be approved and authorized by the Township Board of Trustees. A contract will be developed based in part on the information in the Request for Proposals, which will be incorporated into the contract by reference. The contract is expected to be in a form very similar to the attached Exhibit 2.

Acceptance of a proposal does not constitute a contract. Subsequently discovered information or circumstances may prompt the Township to rescind acceptance of any proposal after it has been accepted, but before the Township has taken action to authorize the contract to be signed. The Township Board reserves the right to rescind its acceptance of any proposal at any time until such time that the Township Board acts legislatively to accept a proposal by adopting an appropriate resolution authorizing signature on a contract. At no time has a contract been formed until the Township Board has so acted and the contract is signed by the authorized individuals.

Daniel DeFranco
Township Manager

Proposal Form
Saugatuck Township
Contract Assessment
Proposed Annual Lump Sum Breakdown

- A. Jun 2022 – Jun 2023 \$ _____
- B. Jun 2023 – Jun 2024 \$ _____
- C. Jun 2024 – Jun 2025 \$ _____
- D. Total – 36 Months (Jun 2022 – Jul 2025)

F. Additional Cost Per New Parcel
(if applicable) \$ _____

In submitting this proposal it is understood that the Saugatuck Township reserves the right to reject any and all proposals, to waive irregularities and/or informalities in any proposal, to negotiate modifications in any proposal and to make an award in any manner, consistent with law, deemed to be in the best interest of the Township.

This proposal is to remain firm for a minimum of ninety (90) days.

In submitting this proposal it is understood that the Saugatuck Township will require a successful proponent to enter into a contract document with Township which must be approved and authorized by the Saugatuck Township Board of Trustees.

Dated and signed this _____ day of _____ 2022.

Name of Proponent: _____

By: _____

Signature: _____

Title: _____

Business Address: _____

Telephone Number: _____

Saugatuck Township
REQUEST FOR PROPOSALS
ASSESSING SERVICES

Proposal Information is available at the Township Hall
3461 Blue Star Highway
Saugatuck, MI 49453
269-857-7721

Exhibit 1

2022 REPORT OF ASSESSMENT ROLL CHANGES AND CLASSIFICATION

Assessing officers are required to report the total assessed value for each class of property and the assessment roll changes for each class of property for County and State Equalization. This form is issued under authority of P.A. 206 of 1893. This report shall be signed by the assessing officer and filed with the State Tax Commission and the County Equalization Department immediately following adjournment of the Board of review - Administrative Rule 209.26(6b). **REPORT ONLY ASSESSED VALUES ON THIS FORM.**

COUNTY ALLEGAN CITY OR TOWNSHIP SAUGATUCK TWP

REAL PROPERTY	Parcel Count	2021 Board of Review	Loss	(+ / -) Adjustment	New	2022 Board of Review	Does Not Cross Foot (*)
100 Agricultural	83	10,469,200	249,700	84,000	398,100	10,701,600	
200 Commercial	224	20,892,200	35,000	282,500	3,187,900	24,327,600	
300 Industrial	5	163,000	0	8,100	0	171,100	
400 Residential	2,702	462,767,873	5,450,300	31,175,821	10,719,500	499,212,894	
500 Timber - Cutover	0	0	0	0	0	0	
600 Developmental	0	0	0	0	0	0	
800 TOTAL REAL	3,014	494,292,273	5,735,000	31,550,421	14,305,500	534,413,194	
PERSONAL PROPERTY	Parcel Count	2021 Board of Review	Loss	(+ / -) Adjustment	New	2022 Board of Review	Does Not Cross Foot (*)
150 Agricultural	0	0	0	0	0	0	
250 Commercial	110	1,140,300	117,000	0	576,800	1,600,100	
350 Industrial	0	0	0	0	0	0	
450 Residential	0	0	0	0	0	0	
550 Utility	16	6,043,500	17,100	0	299,700	6,326,100	
850 TOTAL PERSONAL	126	7,183,800	134,100	0	876,500	7,926,200	
TOTAL REAL & PERSONAL	3,140	501,476,073	5,869,100	31,550,421	15,182,000	542,339,394	

CERTIFICATION

Assessor Printed Name 	Certificate Number R-9234
Assessor Officer Signature 	Date 03/22/2022

The completed form must be signed by the local unit assessor who is the assessor of record with the State Tax Commission.

The form may be submitted in one of the following manners:

- 1) Mail the ORIGINAL completed form, with the ORIGINAL assessor of record signature to the State Tax Commission, PO Box 30471, Lansing, MI 48909
- 2) Email the completed form with the assessor of record signature to Equalization@michigan.gov

The assessor must submit the first copy of the completed form to the County Equalization Department. The form is to be re-viewed and approved by County Equalization.

If there are errors found by County Equalization, the errors are to be corrected and a revised copy is to be immediately submitted to the State Tax Commission.

The assessor of record must retain a copy of the completed form.

If after submitting the completed form to the State Tax Commission and County Equalization, the assessor of record discovers there are errors within the form, the assessor of record shall correct the form and submit the revised copy to the County Equalization Department. The revised form must be identifying as a revised copy. Once the revised copy is reviewed and approved by County Equalization, the revised copy must be immediately submitted to the State Tax Commission.