

REQUEST FOR PROPOSAL
PROFESSIONAL ASSESSING
SERVICES



PROPOSALS DUE: 5:00 P.M., July 21, 2016

LOCATION: City of Tonka Bay
4901 Manitou Road
Tonka Bay, MN 55331

**CITY OF TONKA BAY
REQUEST FOR PROPOSAL FOR
PROFESSIONAL CITY ASSESSING SERVICES**

I. PURPOSE OF REQUEST

The City of Tonka Bay is requesting qualifications and proposals from individuals/ companies experienced in city assessing to provide assessing services to the City and act as City Assessor. Preference will be given to those submittals which demonstrate experience in this area. As City Assessor, the selected party will be expected to provide a wide and diverse range services as described throughout this Request for Proposals (RFP). The City Assessor is to be appointed by the City Council and works under the direction of the City Administrator.

As a result of this RFP, the City will select a top qualifier with whom to commence contract negotiations. If negotiations are successful, the City will enter into a professional services contract with that party. The City will consider a City Assessor contract of two (2) years, renewable annually thereafter. The initial contract period is anticipated to start August 29, 2016 and will continue on August 29, 2018. The City reserves the right to conduct an annual review of these services and the City Assessor's performance. The City retains the option to use alternative service methods and providers when the City deems it appropriate.

II. GENERAL INFORMATION

- A. The City of Tonka Bay is a suburban community of approximately 1,475 residents located within thirty minutes of downtown Minneapolis. The City covers 632 acres in western Hennepin County.
- B. The City operates under a Council-Administrator form of government. The City Council is the legislative and policy making body of the City. The Council consists of the Mayor and four Councilmembers. The City Administrator is the chief administrative officer of the City. The City Administrator is accountable to the City Council for the implementation of Council direction and the administration of all affairs of the City. The City Council meets the second and fourth Tuesday of every month.
- C. The City is responsible for maintaining approximately nine miles of roads. All city roads are paved.
- D. The City is responsible for maintaining five (5) parks.
- E. The City has three public works employees and three administration employees.

- F. The City consults with private firms for engineering, planning, and legal services.
- G. The City holds a joint-powers agreement with the Excelsior Fire District and the South Lake Minnetonka Police Department for fire and police services.
- H. There are a total of 829 parcels in Tonka Bay. 783 of those parcels were taxable in 2016 with a total value of \$549,883,000. This includes \$2,032,000 in new improvements. The total increase for 2016 is 4.9%.

III. INSTRUCTIONS TO PROPOSERS

- A. All proposals should be sent and all questions and correspondence should be directed to:
 - City of Tonka Bay
 - Lindy Crawford, City Administrator
 - 4901 Manitou Road
 - Tonka Bay, MN 55331
 - 952-474-7994
 - lcrawford@cityoftonkabay.net
- B. All proposals must be received no later than 5:00 p.m., July 21, 2016. One electronic copy and three (3) hard copies of the proposal must be presented. The proposals shall be sealed and clearly identified with “City Assessor” by the submittal deadline.
- C. In order to be considered a valid proposal, each proposal must meet the following requirements:
 - i. Written proposals received after 5:00 p.m., July 21, 2016 will not be considered.
 - ii. Each proposal must be signed by an officer of your company who can be held accountable for all representations.
- D. The proposal shall be limited to a maximum of twenty (20) pages. Additional material, other than that requested by the City of Tonka Bay, will be disregarded.
- E. The City will review the proposals and may schedule interviews for finalists.
- F. Proposers are prohibited from contacting any members of the City Council regarding this proposal.

IV. PROPOSAL CONTENTS

- A. Title Page Show the proposal subject, the name of the proposer's company, address, telephone number, email address, and name of the contact person and the date.
- B. Table of Contents Include a clear identification of the material by section and page number.
- C. Executive Summary Introduce the proposal and summarize the key provisions of the proposal. Provide a statement describing why the proposer is qualified to perform this work and the name and qualifications of the individual who would serve as City Assessor.
- D. Statement of Understanding Include a detailed statement of understanding of the City Assessor services to be provided. If there are services listed in this RFP that the proposer will not be able to provide, describe those services in this section.
- E. Approach to Assessing Services Provide a response to each of the following items:
- i. Describe your view of the role of the City Assessor.
 - ii. Describe how you track and manage costs so that City assessing costs are held to a minimum.
 - iii. Describe how as the City Assessor you would work with the City Administrator.
 - iv. Describe how as the City Assessor you would work with the Mayor and City Council.
 - v. Describe the company's practices regarding professional development, training, and keeping current in matters affecting their clients.
- F. Background and Capacity
- i. Describe your company's background/ history; including the number of years in business.
 - ii. Location of office(s) that would serve the City of Tonka Bay.
 - iii. Staff services available (clerical support, etc.).
- G. Proposed Assessor(s) Name the person whom you propose to designate as City Assessor. Provide the following:
- i. Certificates or licenses (including the date of Minnesota Assessor's License);
 - ii. Description of education;
 - iii. Professional background and professional associations;
 - iv. Experience with and knowledge relating to assessing; and

v. Expertise and training.

H. References Provide contact information for three (3) municipal clients for which services have been provided in the last five years, so reference checks can be conducted. Please include the contact person's name, municipality, phone number, and email address.

I. Clients/ Conflict of Interests List all public clients for whom your company currently provides services. Indicate the services provided. Identify any potential conflicts of interest that could result from such representation and the manner in which you would propose to resolve such conflicts.

V. SCOPE OF WORK

The City of Tonka Bay is searching for an Assessor that will provide all functions required of the local assessors by Minnesota State Statutes and Hennepin County. The Assessor is required to be knowledgeable in a variety of areas, including but not limited to:

- i. General municipal, state and federal laws relating to municipal government and assessing.
- ii. Zoning, housing, annexation, subdivision and land use.
- iii. Economic development activities including development, redevelopment, and property/ real estate.

At a minimum, the following assessing services shall be provided as outlined below.

- A. Provide all assessment functions required of the City under the provisions of Minnesota Statutes, Chapter 273.
- B. Meet all assessment deadlines and follow all guidelines and procedures as set per the County Assessor.
- C. Physically inspect and revalue 20% of the real property, as required by law, and timely submit appraisal cards for data processing each year.
- D. Adjust the estimated market values on those properties not physically inspected per sales analysis to meet minimum assessment levels each assessment year.
- E. Physically inspect and value all new construction, additions and renovation each assessment year and submit with initial assessment.
- F. Post values electronically to the assessment roll and transmit to Hennepin County.
- G. Maintain and update the property characteristics of all property types in a database.
- H. Maintain database of current and historic values and classifications.
- I. Administer the homestead classification database, and process all applications.

- J. Investigate and verify all Certificate of Real Estate Value for all sales of apartment, commercial, industrial, and corresponding land properties per Minnesota Department of Revenue guidelines.
- K. Complete divisions and combinations in a timely manner throughout the assessment year.
- L. Conduct valuation reviews prior to Local Board of Appeals and Equalization.
- M. Attend and participate in the local Board of Appeal and Equalization on a date selected by the City Council, and attend City Council meetings as requested.
- N. Advise Mayor, Councilmembers, City Administrator, and other staff on City assessing matters.
- O. Administer the abatement process pursuant to Minnesota Statute 375.192.
- P. Respond, communicate effectively, and meet with property owners, general public, City of Tonka Bay employees and elected officials, Hennepin County Assessing staff, and others regarding assessment of appraisal issues and inquiries.

VI. BASIS FOR COMPENSATION

Compensation for assessing services shall be on a monthly or quarterly retainer fee basis based upon the taxable parcels within the city.

- A. A retainer fee basis of payment shall apply to all or parts of a work scope where the tasks can be readily defined and/or the level of effort required to accomplish such tasks can be estimated with a reasonable degree of accuracy. Please describe what work is included in the retainer fee.
- B. Include a detailed description and explanation of all fees and/or charges that may arise for assessing services. Direct expenses shall be reimbursed at cost. Routine travel expenses would be the responsibility of the assessing company.

VII. SELECTION

A. The City reserves the right to accept or reject any or all submissions in the best interest of the City. In connection with the evaluation, the City may, at its option, invite one or more applicants to make a presentation to the selection committee at time and location to be announced, and may require the submission of supplemental material intended to substantiate or clarify information previously submitted.

B. Terms and Conditions

- i. The City of Tonka Bay reserves the right to cancel or amend the Request for Proposals at any time. The City of Tonka Bay reserves the right to determine the successful respondent. The

City of Tonka Bay reserves the right to reject any or all proposals.

- ii. The City of Tonka Bay will not be liable for any costs incurred by the company responding to this request.
- iii. For the purposes of this agreement, the consultant shall be deemed to be an independent contractor, and not an employee of the City. Any and all agents, servants, or employees of the company or other persons, while engaged in the performance of any work or services required to be performed by the City of Tonka Bay under this agreement, shall not be considered employees of the City and any and all actions which arise as a consequence of any act or omission on the part of the company, its agents, servants, employees or other persons shall in no way be the obligation or responsibility of the City. The consultant, its agents, servants, or employees shall be entitled to none of the rights, privileges, or benefits of organization employees except as otherwise may be stated herein.
- iv. The consultant agrees to comply with the provisions of all applicable federal, state, and City of Tonka Bay statutes, ordinances, regulations and policies pertaining to civil rights and nondiscrimination including without limitation Minnesota Statutes, Section 181.59, incorporated herein by reference.
- v. The consultant agrees to comply with the Minnesota Government Data Practices Act, Minnesota Statutes, Chapter 13, and all other applicable state and federal laws relating to data privacy or confidentiality. Consultant shall immediately report to the City any requests from third parties for information. All data created, collected, received, stored, used, maintained, or disseminated by consultant in performing its obligations is subject to the requirements of the Act, and consultant must comply with those requirements as if it were a government entity. The City agrees to promptly respond to inquiries from consultant concerning data requests. Consultant agrees to hold the City, its officers, department heads and employees harmless from any claims resulting from consultant's failure to disclose data maintained by Consultant authorized for release by the City, and from consultant's unlawful disclosure or use of data protected under state and federal laws.

VIII. CONTRACT ETHICS

- A. No elected official or employee of the City who exercises any responsibilities in the review, approval, or implementation of the proposal or contract shall participate in any decisions, which affects his or her direct or indirect personal or financial interest.

- B. It is a breach of ethical standards for any person to offer, give or agree to give any City employee or Councilmember or for any City employee or Councilmember to solicit, demand, accept, or agree to accept from another person or firm, a gratuity or an offer of employment whenever a reasonably prudent person would conclude that such consideration was motivated by an individual, group or corporate desire to obtain special, preferential, or more favorable treatment than is normally accorded to the general public.
- C. The company shall not assign any interest in this contract and shall not transfer any interest in the same without the prior written consent of the City.
- D. The company shall not accept any client or project that places it in a conflict of interest with its representation of the City of Tonka Bay. If such a conflict of interest is subsequently discovered, the City shall be promptly notified.

REQUEST FOR PROPOSAL AND SELECTION SCHEDULE

City Council Approval of RFP:	June 28, 2016
Advertise and Distribute RFP:	June 29, 2016
RFP Submittal Deadline:	July 21, 2016
Review of Proposals:	July 28, 2016
Interviews:	August 1, 2016
Appointment of City Assessor:	August 23, 2016
Start Date:	August 29, 2016