

REQUEST FOR PROPOSALS

Item Description: Statistical Revaluation December 31, 2021 and Valuation Services for Utility Property

Date to be opened: Monday, May 24, 2021

Issuing Department: City Assessor

QUESTIONS

- Please direct questions relative to the bidding process, how to fill out forms, and how to submit a bid (Pages 1-8) to Purchasing Agent Patti Jordan.
 - Phone: (401) 680-5264
 - Email: pjordan@providenceri.gov
 - Please use the subject line “**RFP Question**”
- Please direct questions relative to the Minority and Women’s Business Enterprise Program and the corresponding forms (Pages 9-13) to the MBE/WBE Outreach Director for the City of Providence, Grace Diaz
 - Phone: (401) 680-5766
 - Email: gdiaz@providenceri.gov
 - Please use subject line “**MBE WBE Forms**”
- Please direct questions relative to the specifications outlined (beginning on page 14) to the issuing department’s subject matter expert:
 - **Elyse Pare**
 - **401-680-5495**
 - epare@providenceri.gov

Pre-bid Conference

NO PRE-BID CONFERENCE

INSTRUCTIONS FOR SUBMISSION

Bids may be submitted up to **2:15 P.M.** on the above meeting date at the **Department of the City Clerk, Room 311, City Hall, 25 Dorrance Street, Providence.** At 2:15 P.M. all bids will be publicly opened and read at the Board of Contract Meeting in the City Council Chambers, on the 3rd floor of City Hall.

- Bidders must submit **3 copies** of their bid in sealed envelopes or packages labeled with the captioned **Item Description** and the **City Department to which the RFP and bid are related and must include the company name and address on the envelope as well.** (On page 1).
- If required by the Department, please keep the original bid bond and check in only one of the envelopes.
- Communications to the Board of Contract and Supply that are not competitive sealed bids (i.e. product information/samples) should have “**NOT A BID**” written on the envelope or wrapper.
- Only use form versions and templates included in this RFP. If you have an old version of a form do not recycle it for use in this bid.
- The bid envelope and information relative to the bid must be addressed to:

**Board of Contract and Supply
Department of the City Clerk – City Hall, Room 311
25 Dorrance Street
Providence, RI 02903**

****PLEASE NOTE: This bid may include details regarding information that you will need to provide (such as proof of licenses) to the issuing department before the formalization of an award.**

This information is NOT requested to be provided in your initial bid by design.

All bids submitted to the City Clerk become public record. Failure to follow instructions could result in information considered private being posted to the city’s Open Meetings Portal and made available as a public record. The City has made a conscious effort to avoid the posting of sensitive information on the City’s Open Meetings Portal, by requesting that such sensitive information be submitted to the issuing department only at their request.

BID PACKAGE CHECKLIST

Digital forms are available in the City of Providence Purchasing Department Office or online at <http://www.providenceri.gov/purchasing/how-to-submit-a-bid/>

The bid package **MUST** include the following, in this order:

- Bid Form 1: Bidder's Blank as the cover page/ 1st page (*see page 6 of this document*)
- Bid Form 2: Certification of Bidder as 2nd page (*see page 7 of this document*)
- Bid Form 3: Certificate Regarding Public Records (*see page 8 of this document*)
- Forms from the Minority and Women Business Enterprise Program: Based on Bidder Category. *See forms and instructions enclosed (pages 9-13) or on: <https://www.providenceri.gov/purchasing/minority-women-owned-business-mbewbe-procurement-program/>*

***Please note: MBE/WBE forms must be completed for EVERY bid submitted and must be inclusive of ALL required signatures. Forms without all required signatures will be considered incomplete.**

- Bidder's Proposal/Packet: Formal response to the specifications outlined in this RFP, including pricing information and details related to the good(s) or service(s) being provided. Please be mindful of formatting responses as requested to ensure clarity.
- Financial Assurance, *if requested* (as indicated on page 5 of this document under "Bid Terms")

All of the above listed documents are REQUIRED. (With the exception of financial assurances, which are only required if specified on page 5.)

******Failure to meet specified deadlines, follow specific submission instructions, or enclose all required documents with all applicable signatures will result in disqualification, or in an inability to appropriately evaluate bids.***

NOTICE TO VENDORS

1. The Board of Contract and Supply will make the award to the lowest qualified and responsible bidder.
2. In determining the lowest responsible bidder, cash discounts based on preferable payment terms will not be considered.
3. Where prices are the same, the Board of Contract and Supply reserves the right to award to one bidder, or to split the award.
4. No proposal will be accepted if the bid is made in collusion with any other bidder.
5. Bids may be submitted on an “equal in quality” basis. The City reserves the right to decide equality. Bidders must indicate brand or the make being offered and submit detailed specifications if other than brand requested.
6. A bidder who is an out-of-state corporation shall qualify or register to transact business in this State, in accordance with the Rhode Island Business Corporation Act, RIGL Sec. 7-1.2-1401, et seq.
7. The Board of Contract and Supply reserves the right to reject any and all bids.
8. Competing bids may be viewed in person at the Department of the City Clerk, City Hall, Providence, immediately upon the conclusion of the formal Board of Contract and Supply meeting during which the bids were unsealed/opened. Bids may also be accessed electronically on the internet via the City’s [Open Meetings Portal](#).
9. As the City of Providence is exempt from the payment of Federal Excise Taxes and Rhode Island Sales Tax, prices quoted are not to include these taxes.
10. In case of error in the extension of prices quoted, the unit price will govern.
11. The contractor will **NOT** be permitted to: a) assign or underlet the contract, or b) assign either legally or equitably any monies or any claim thereto without the previous written consent of the City Purchasing Director.
12. Delivery dates must be shown in the bid. If no delivery date is specified, it will be assumed that an immediate delivery from stock will be made.
13. A certificate of insurance will normally be required of a successful vendor.
14. For many contracts involving construction, alteration and/or repair work, State law provisions concerning payment of prevailing wage rates apply ([RIGL Sec. 37-13-1 et seq.](#))
15. No goods should be delivered or work started without a Purchase Order.
16. **Submit 3 copies of the bid to the City Clerk, unless the specification section of this document indicates otherwise.**
17. Bidder must certify that it does not unlawfully discriminate on the basis of race, color, national origin, gender, gender identity or expression, sexual orientation and/or religion in its business and hiring practices and that all of its employees are lawfully employed under all applicable federal, state and local laws, rules and regulations. (See Bid Form 2.)

BID TERMS

1. Financial assurances may be required in order to be a successful bidder for Commodity or Construction and Service contracts. If either of the first two checkboxes below is checked, the specified assurance **must accompany** a bid, or the bid will not be considered by the Board of Contract and Supply. The third checkbox indicates the lowest responsible bidder will be contacted and required to post a bond to be awarded the contract.
 - a) A certified check for \$_____ must be deposited with the City Clerk as a guarantee that the Contract will be signed and delivered by the bidder.
 - b) A bid bond in the amount of _____ per centum (%) of the proposed total price, must be deposited with the City Clerk as a guarantee that the contract will be signed and delivered by the bidder; and the amount of such bid bond shall be retained for the use of the City as liquidated damages in case of default.
 - c) A performance and payment bond with a satisfactory surety company will be posted by the bidder in a sum equal to one hundred per centum (100%) of the awarded contract.
 - d) No financial assurance is necessary for this item.
2. Awards will be made within **sixty (60) days of bid opening**. All bid prices will be considered firm, unless qualified otherwise. Requests for price increases will not be honored.
3. Failure to deliver within the time quoted or failure to meet specifications may result in default in accordance with the general specifications. It is agreed that deliveries and/or completion are subject to strikes, lockouts, accidents and Acts of God.

The following entry applies only for COMMODITY BID TERMS:

4. Payment for partial delivery will not be allowed except when provided for in blanket or term contracts.

The following entries apply only for CONSTRUCTION AND SERVICE BID TERMS:

5. Only one shipping charge will be applied in the event of partial deliveries for blanket or term contracts.
6. Prior to commencing performance under the contract, the successful bidder shall attest to compliance with the provisions of the Rhode Island Worker's Compensation Act, RIGL 28-29-1, et seq. If exempt from compliance, the successful bidder shall submit a sworn Affidavit by a corporate officer to that effect, which shall accompany the signed contract.
7. Prior to commencing performance under the contract, the successful bidder shall, submit a certificate of insurance, in a form and in an amount satisfactory to the City.

BID FORM 1: Bidders Blank

1. Bids must meet the attached specifications. Any exceptions or modifications must be noted and fully explained.
2. Bidder's responses must be in ink or typewritten, and all blanks on the bid form should be completed.
3. The price or prices proposed should be stated both in **WRITING** and in **FIGURES**, and any proposal not so stated may be rejected. **Contracts exceeding twelve months must specify annual costs for each year.**
4. Bids **SHOULD BE TOTALED** so that the final cost is clearly stated (unless submitting a unit price bid), however **each item should be priced individually**. Do not group items. Awards may be made on the basis of *total* bid or by *individual items*.
5. All bids **MUST BE SIGNED IN INK.**

Name of Bidder (Firm or Individual):

Contact Name:

Business Address:

Business Phone #:

Contact Email Address:

Agrees to bid on (Write the "Item Description" here):

If the bidder's company is based in a state *other than Rhode Island*, list name and contact information for a local agent for service of process that *is located within Rhode Island*

Delivery Date (if applicable):

Name of Surety Company (if applicable):

Total Amount in Writing*:

Total Amount in Figures*:

**** If you are submitting a unit price bid, please insert "Unit Price Bid"***

Use additional pages if necessary for additional bidding details.

Signature of Representation

Title

BID FORM 2: Certification of Bidder

(Non-Discrimination/Hiring)

Upon behalf of _____ (Firm or Individual Bidding),

I, _____ (Name of Person Making Certification),

being its _____ (Title or "Self"), hereby certify that:

1. Bidder does not unlawfully discriminate on the basis of race, color, national origin, gender, sexual orientation and/or religion in its business and hiring practices.
2. All of Bidder's employees have been hired in compliance with all applicable federal, state and local laws, rules and regulations.

I affirm by signing below that I am duly authorized on behalf of

Bidder, on

this _____ day of _____ 20_____.

Signature of Representation

Printed Name

BID FORM 3: Certificate Regarding Public Records

Upon behalf of _____ (Firm or Individual Bidding),

I, _____ (Name of Person Making Certification),

being its _____ (Title or "Self"), hereby certify an understanding that:

1. All bids submitted in response to Requests for Proposals (RFP's) and Requests for Qualification (RFQ's), documents contained within, and the details outlined on those documents become public record upon receipt by the City Clerk's office and opening at the corresponding Board of Contract and Supply (BOCS) meeting.
2. The Purchasing Department and the issuing department for this RFP/RFQ have made a conscious effort to request that sensitive/personal information be submitted directly to the issuing department and only at request if verification of specific details is critical the evaluation of a vendor's bid.
3. The requested supplemental information may be crucial to evaluating bids. Failure to provide such details may result in disqualification, or an inability to appropriately evaluate bids.
4. If sensitive information that has not been requested is enclosed or if a bidder opts to enclose the defined supplemental information prior to the issuing department's request in the bidding packet submitted to the City Clerk, the City of Providence has no obligation to redact those details and bears no liability associated with the information becoming public record.
5. The City of Providence observes a public and transparent bidding process. Information required in the bidding packet may not be submitted directly to the issuing department at the discretion of the bidder in order to protect other information, such as pricing terms, from becoming public. Bidders who make such an attempt will be disqualified.

I affirm by signing below that I am duly authorized on behalf of

Bidder, on

this _____ day of _____ 20____.

Signature of Representation

Printed Name

WBE/MBE Form Instructions

The City of Providence actively seeks Minority and Women business enterprises to participate in bids to meet the City's procurement needs. Pursuant to the City of Providence Code of Ordinances, Chapter 21, Article II, Sec. 21-52 (Minority and Women's Business Enterprise) and Rhode Island General Laws (as amended), Chapter 31-14, et seq. (Minority Business Enterprise), Minority Business Enterprise (MBE) and Women's Business Enterprise (WBE) participation goals apply to contracts.

The goal for Minority Business Enterprise (MBE) participation is **10%** of the total bid value.

The goal for Women's Business Enterprise (WBE) participation is **10%** of the total bid value.

The goal for combined MBE/WBE participation is **20%** of the total bid value.

Only businesses certified with the State of Rhode Island as minority and/or women business enterprises are counted towards the City's goals. Eligible minority or women-owned businesses are encouraged to seek certification from the State of Rhode Island Minority Business Enterprise Compliance Office at: <http://odeo.ri.gov/offices/mbeco/>

Note: MBE certification with the State of Rhode Island on the basis of Portuguese heritage is not currently recognized by the City of Providence's MBE program.

Bid Requirements:

All Bidders: All bidders must complete and submit the ***MBE/WBE Participation Affidavit*** indicating whether or not they are a state-certified MBE/WBE and acknowledging the City's participation goals. Submission of this form is required with **every bid**. Your bid will not be accepted without an affidavit.

Bidders who will be subcontracting: Bidders who will be subcontracting must submit the ***Subcontractor Disclosure Form*** as part of their bid submission. All subcontractors, regardless of MBE/WBE status, must be listed on this form. Business NAICS codes can be found at <https://www.naics.com/search/>. Awarded bidders are required to submit ***Subcontractor Utilization and Payment Reports*** with each invoice.

Waiver Requests:

If the percentage of the total amount of the bid being awarded to MBE or WBE vendors is less than 20% (Box F on the Subcontractor Disclosure Form) and the prime contractor is not a Rhode Island State-certified MBE or WBE, the Bidder must complete the ***MBE/WBE Waiver Request Form*** for review. Waivers will be considered on a case by case basis.

No waiver will be granted unless the waiver request includes documentation that demonstrates that the Bidder has made good faith efforts to achieve the City's stated participation goals. Waivers must be reviewed and signed by the City of Providence's MBE/WBE Outreach Director, Grace Diaz, or her designee. Department Directors cannot recommend a bidder for award if this form is applicable and absent. If the bid does not meet the participation goals of the City of Providence and a waiver is not filed with the signature of the MBE/WBE Outreach Director or her designee, the bid will not be accepted.

Verifying MBE/WBE Certification

It is the responsibility of the bidder to confirm that every MBE/WBE named in a proposal and included in a contract is certified by the Rhode Island Minority Business Enterprise Compliance office. The current MBE/WBE directory is available at the State of RI MBE Office, One Capitol Hill, 2nd Floor, Providence, RI, or online at <http://odeo.ri.gov/offices/mbeco/mbe-wbe.php>. You can also call (401) 574-8670 to verify certification, expiration dates, and services that the MBE/WBE is certified to provide. Note: MBE certification with the State of Rhode Island on the basis of Portuguese heritage is not currently recognized by the City of Providence's MBE program.

Form Instructions:

Access all bid forms from <http://www.providenceri.gov/oeo/> or <http://www.providenceri.gov/purchasing/minority-women-owned-business-mbewbe-procurement-program/>. **Download** the forms as blank PDFs. Once saved on your computer, fill them out using the

Adobe program. The fillable PDFs must be completed in Adobe in order to be saved properly. Google Chrome and similar platforms do not allow for the forms to be saved as filled PDFs. Therefore, please download the blank forms to your computer, then fill them out and save.

Assistance with Form Requirements

Examples of completed forms can be found on the City of Providence website at <http://www.providenceri.gov/oeo/> or <http://www.providenceri.gov/purchasing/minority-women-owned-business-mbewbe-procurement-program/>.

Contract Requirements:

Prime contractors engaging subcontractors must submit the *Subcontractor Utilization and Payment Report* to the City Department's Fiscal Agent with every invoice and with request for final payment. This form is not submitted as a part of the initial bid package.

For contracts with duration of less than 3 months, this form must be submitted along with the contractor's request for final payment. The form must include all subcontractors utilized on the contract, both MBE/WBE and non- MBE/WBE, the total amount paid to each subcontractor for the given period and to date. During the term of the contract, any unjustified failure to comply with the MBE/WBE participation requirements is a material breach of contract.

Questions?

For more information or for assistance with MBE/WBE Forms, contact the City of Providence MBE/WBE Outreach Director, Grace Diaz, at mbe-wbe@providenceri.com or (401) 680-5766.

MBE/WBE PARTICIPATION AFFIDAVIT

Item Discussion (as seen on RFP):

Prime Bidder: _____

Prime Bidder (Company) Phone Number: _____

Which one of the following describes your business' status in terms of Minority and/or Woman-Owned Business Enterprise certification with the State of Rhode Island? MBE WBE
 Neither MBE nor WBE

By initialing the following sections and signing the bottom of this document in my capacity as the contractor or an authorized representative of contractor, I make this Affidavit:

It is the policy of the City of Providence that minority business enterprises (MBEs) and women business enterprises (WBEs) should have the maximum opportunity to participate in procurements and projects as prime contractors and vendors. Pursuant to Sec. 21-52 of the Providence Code of Ordinances and Chapter 31-14 *et seq.* of the Rhode Island General Laws (as amended), MBE and WBE participation goals apply to contracts.

- The goal for Minority Business Enterprise (MBE) participation is 10% of the total bid value.
- The goal for Women's Business Enterprise (WBE) participation is 10% of the total bid value.
- The goal for combined MBE/WBE participation is 20% of the total bid value.

I acknowledge the City of Providence's goals of supporting MBE/WBE certified businesses. Initial _____

If awarded the contract, I understand that my company must submit to the Minority and Women's Business Coordinator at the City of Providence (MBE/WBE Office), copies of all executed agreements with the subcontractor(s) being utilized to achieve the participation goals and other requirements of the RI General Laws. **I understand that these documents must be submitted prior to the issuance of a notice to proceed.** Initial _____

I understand that, if awarded the contract, my firm must submit to the MBE/WBE Office canceled checks and reports required by the MBE/WBE Office on a quarterly basis verifying payments to the subcontractors(s) utilized on the contract. Initial _____

If I am awarded this contract and find that I am unable to utilize the subcontractor(s) identified in my Statement of Intent, I understand that I must substitute another certified MBE and WBE firm(s) to meet the participation goals. **I understand that I may not make a substitution until I have obtained the written approval of the MBE/WBE Office.** Initial _____

If awarded this contract, I understand that authorized representatives of the City of Providence may examine the books, records and files of my firm from time to time, to the extent that such material is relevant to a determination of whether my firm is complying with the City's MBE/WBE participation requirements.

Initial _____

I do solemnly declare and affirm under the penalty of perjury that the contents of the foregoing Affidavit are true and correct to the best of my knowledge, information and belief.

Signature of Bidder

Printed Name

Company Name

Date

SUBCONTRACTOR DISCLOSURE FORM

Fill out this form only if you WILL SUBCONTRACT with other parties. If you will not subcontract any portion of the proposed bid, do not fill out this form.

Prime Bidder: _____ Primary
 NAICS _____ Code: _____

Item Description (as seen on RFP): _____

Please list all Subcontractors below. Include the total dollar value that you propose to share with each subcontractor and the dollar amount to be subcontracted. Please check off MBE and WBE where applicable. The directory of all state-certified MBE/WBE firms is located at www.mbe.ri.gov. Business NAICS codes can be found at <https://www.naics.com/search/>

Proposed Subcontractor	MBE	WBE	Primary NAICS Code	Date of Mobilization	\$ Value of Subcontract
					\$
					\$
					\$
					\$
					\$
					\$
A. MBE SUBCONTRACTED AMOUNT:					\$
B. WBE SUBCONTRACTED AMOUNT:					\$
C. NON MBE WBE SUBCONTRACTED AMOUNT:					\$
D. DOLLAR AMOUNT OF WORK DONE BY THE PRIME CONTRACTOR:					\$
E. TOTAL AMOUNT OF BID (SUM OF A, B, C, & D):					\$
F. PERCENTAGE OF BID SUBCONTRACTED TO MBEs AND WBEs. (Divide the sum of A and B by E and multiply result by 100).					%

Please read and initial the following statement acknowledging you understand. If the percentage of the total amount of the bid being awarded to MBE or WBE vendors is less than 20% (Box F) and the prime contractor is NOT a Rhode Island State-certified MBE or WBE, **you must fill out the MBE/WBE WAIVER REQUEST FORM for consideration by City of Providence MBE/WBE Outreach Director.** Initial _____

 Signature of Bidder

Printed Name

MBE/WBE Waiver Request Form

Fill out this form only if you are subcontracting and did not meet the 20% MBE/WBE participation goal.

State-certified MBE or WBE Prime Bidders are NOT REQUIRED to fill out this form.

Submit this form to the City of Providence MBE/WBE Outreach Director, Grace Diaz, at mbe-wbe@providenceri.gov, for review **prior to bid submission**. This waiver applies only to the current bid which you are submitting to the City of Providence and does not apply to other bids your company may submit in the future.

Prime Bidder: _____

Company Trade: _____

Item Discussion (as seen on RFP): _____

To receive a waiver, you must list the certified MBE and/or WBE companies you contacted, the name of the primary individual with whom you interacted, and the reason the MBE/WBE company could not participate on this project.

MBE/WBE Company Name	Individual's Name	Company Trade	Why did you choose not to work with this company?

I acknowledge the City of Providence's goal of a combined MBE/WBE participation is 20% of the total bid value. I am requesting a waiver of _____ % MBE/WBE (20% minus the value of **Box F** on the Subcontractor Disclosure Form). If an opportunity is identified to subcontract any task associated with the fulfillment of this contract, a good faith effort will be made to select MBE/WBE certified businesses as partners.

Signature of Prime Contractor

Printed Name

Date

Signature of City of Providence
MBE/WBE Outreach Director

Printed Name of City of Providence
MBE/WBE Outreach Director

Date

BID PACKAGE SPECIFICATIONS

Statistical Revaluation December 31, 2021 and for Valuation Services for Utility Property

BID OPENING MONDAY MAY 24, 2021

In addition to addressing each of the items in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least sixty (60) Calendar Days from the deadline for the submission of proposals.
2. A list of Rhode Island Municipalities for which the Contractor has completed Revaluation Programs for last five years, and contacts.
3. A list of Municipalities for which the Project Manager has managed revaluation projects.
4. A list of Rhode Island Revaluation Contracts for which the Contractor is currently committed with the timetable for completion.
5. Description and examples of the Contractor's revaluation public relations program.
6. A bid bond or certified check in the amount of 10% of this bid must be submitted by the bidder with his bid as a guarantee that, in case the contract is awarded to him, he will, within ten days after appropriation of funds and notice of award, execute such contract and furnish a satisfactory Performance Bond.

Proposals will be evaluated using comparative criteria set forth as follows:

1. Contractor's completed Revaluation projects in New England in the past four (4) years, whose total real estate parcel count is 11,000 or greater:

<u>Unacceptable</u>	None in New England
<u>Not Advantageous</u>	Less than Five successful Revaluations in New England
<u>Advantageous</u>	Six to Ten successful Revaluations in New England
<u>Highly Advantageous</u>	Over Ten successful Revaluations in New England
2. Experience of Project Manager to be assigned to this project.

<u>Unacceptable</u>	No Mass Appraisal experience.
<u>Not Advantageous</u>	Less than Five Mass Appraisal projects performed by the Project Manager.
<u>Advantageous</u>	Ten successful Mass Appraisal projects performed by the Project Manager.
<u>Highly Advantageous</u>	Twenty or more successful Mass Appraisal projects performed by the Project Manager.
3. Level of satisfaction with Contractor's performance on other New England Cities and Towns for which Contractor has performed a Revaluation/Update.

<u>Unacceptable</u>	More than two Cities or Towns reporting difficulty with Contractor performance.
<u>Not Advantageous</u>	Up to Two Cities or Towns reporting difficulty with Contractor performance.
<u>Advantageous</u>	No City or Town reporting difficulty with Contractor performance and at least two Cities or Towns reporting high satisfaction.
<u>Highly Advantageous</u>	More than five Cities or Towns reporting high satisfaction and no City or Town reporting poor performance.

4. Method for determination of best price.

The best price shall be the lowest price from a bidder who meets the minimum criteria of the specification and provides the highest level of performance in Questions 1 through 3 under Evaluation Criteria.

5. Project Timetable

Any proposal which cannot meet the project schedule will be rejected.

The City of Providence reserves the right to reject any and all bids. City may waive any defects or irregularities. All bids are subject to appropriation by the City of Providence.

Proposal Form for 2021 Revaluation

THE COMPLETE REAPPRAISAL OF REAL PROPERTY LOCATED WITHIN THE CORPORATE LIMITS OF THE CITY OF PROVIDENCE, RHODE ISLAND, EFFECTIVE DECEMBER 31, 2021.

The undersigned Proposer affirms and declares:

- 1. That this PROPOSAL is executed by said Proposer with full knowledge and acceptance of the CONTRACT (including the Reappraisal and Revaluation Specifications) enclosed with the REQUEST FOR PROPOSALS on the subject project.
- 2. That should this PROPOSAL be accepted in writing by the Chief Executive Officer of the City of Providence, Rhode Island, said Proposer will furnish the services for which this PROPOSAL is submitted at the price bid and in compliance with the provisions of said CONTRACT.
- 3. That this PROPOSAL is accompanied by surety in the form and amount indicated below:

_____ Bid Proposal Bond Amount \$ _____

_____ Certified Check Amount \$ _____

- 4. That the Proposer or his or her representative has visited the City of Providence; is familiar with its geography, general character of houses and its commercial and industrial areas; has examined the quality and condition of the Assessor’s records; verified the parcel counts and has met with the ASSESSOR to make himself or herself knowledgeable of those matters and conditions in the City which would influence this bid proposal.
- 5. That all items, documents and information required to accompany this PROPOSAL of the aforesaid CONTRACT are enclosed herewith.
- 6. That the Proposer proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid CONTRACT for the following amount:

REQUIRED:

Real Property Revaluation \$ _____

OPTIONAL (include detailed proposal(s))

Sketch Verification \$ _____

Desktop Review
(if used in place of physical inspections) \$ _____

Image Collection \$ _____

Conversion of CAMA System \$ _____

SaaS \$ _____

OPTIONAL (CONTINUED)

Addendum Valuation Services for Utility Property \$ _____

7. Proposals are valid for ninety (90) days.
8. That the Proper understands that, although the proposed price is a major factor for consideration, the City reserves the right to award the contract to other than the low cost Proposer after an analysis of the additional factors outlined in the aforesaid CONTRACT.

Firm Name of _____

Proposer: _____

By Signature: _____

Type Name: _____

Title: _____

1 DEFINITIONS

Assessor: The word "Assessor" shall mean the duly appointed Assessor of the City of Providence

- 1.1 Project: The word "project" shall mean Reappraisal and Revaluation of all Real Property in the City of Providence for tax assessment purposes.
- 1.2 City: The word "City" shall hereinafter mean the City of Providence, RI.
- 1.3 Contractor: The word Contractor shall hereinafter mean the Contractor responsible for performing the project defined in Section 2.

2 SCOPE OF PROJECT

- 2.1 Basic Scope: Contractor understands that the project requires the complete statistical Reappraisal and Revaluation of all Real Property within the Corporate Limits of the City of Providence, RI. All work for the project shall be in accordance with these contract specifications.

All work will be carried out and all forms, materials and supplies utilized by Contractor in this project shall conform to, and be carried out in accordance with, the Rhode Island General Statutes, and shall be subject to direct supervision and approval of the Assessor of the City of Providence, RI

The values to be determined by Contractor shall be the full fair market, as defined in Rhode Island General Statutes and shall be based upon nationally recognized methods

of appraising.

Contractor's revaluation program will cover and include all property in the City of Providence, RI in the following categories:

- 2.1.1 All real estate, land, buildings and improvements, including docks.
- 2.1.2 All public utility land and buildings.
- 2.1.3 All mobile homes, mobile home additions and improvements.
- 2.2 Effective Date: The effective date of this revaluation project shall be on the Grand List of December 31, 2021, and the pricing and valuation by Contractor of all land, buildings and property under this contract shall reflect a fair market value as of December 31, 2021.
- 2.3 Parcel Count:
 - 2.3.1 Contractor's price for the revaluation is based upon the following anticipated parcel counts:

01- Single Family Residential Dwellings	14,597
02- Two- Five Family	13,782
03- Apartments	538
04- Combination	809
05- Commercial I	520
06- Commercial II	893
07- Industrial	535
10- Public Utility Buildings	35
12- Other Improved Land	593
13- Vacant Res Land	3,390
14- Vacant Commercial & Industrial	1,588
23- Residential Condominiums	3,698
24- Commercial Condominiums	376
33- Farm Forest and Open Space	2
Misc.- Exempt/Stabilized Property	2,602
TOTAL Real Property Count	43,958

2.3.2 Current basis of assessment is 100%.

2.3.3 The last revaluation was effective as of December 31, 2018.

2.3.4 The area of the City is 20.6 square miles.

3 PERSONNEL AND OFFICE HOURS

- 3.1 Personnel: Contractor shall provide experienced and qualified personnel, as hereinafter provided, and will comply with the requirements of the equal employment opportunity provisions of federal and state governments. Contractor shall submit to the City written qualifications of all personnel assigned to this project. All personnel subject to BCI check.
- 3.2 Qualifications of Personnel: Contractor will comply with Rhode Island certification standards and the qualifications standards set forth in the Request for Proposal for all personnel assigned to this project. All personnel will be subject to the approval of the Assessor, which approval shall not be unreasonably withheld or delayed, and shall be caused to be removed from this project by Contractor upon written recommendation of the Assessor, specifying in detail the reasons for the recommendations.
- 3.3 Identification: All Contractor field personnel shall carry suitable I.D. cards, which shall include an up-to-date photograph, supplied by Contractor and approved by the Assessor. All automobiles used by Contractor's field personnel shall be registered with the City Police Department giving license number, make, model year and color of the vehicle. Vehicles shall be clearly marked as revaluation related with magnetic or other visible signage.
- 3.4 Office Hours and Staffing: Contractor shall maintain an office at City Hall, from the commencement of work on this project through the conclusion of the public hearings. This office shall be staffed with clerical staff as needed, as well as other qualified full-time persons so as to ensure the successful completion of this project in accordance with the completion dates set forth in the contract specifications and any addenda thereto.
- 3.5 Conflict of Interest: No City employee or resident shall be employed by Contractor, except in a clerical capacity, without the approval of the Assessor.

4 PROTECTION OF THE CITY

- 4.1 Bid Bond: Contractor will provide a bid bond in the amount of ten percent (10%) of the bid amount to assure the ability to procure a performance bond. Bid bond will be included with the response to proposal, and clearly marked in a separate envelope.

- 4.2 Performance Bond: Contractor will secure the faithful performance of the terms of this agreement by furnishing to the City a performance surety bond in the amount of this contract, which bond shall be issued by a reputable bonding company licensed to do such business in the State of Rhode Island. Said bond shall be delivered to the City prior to the commencement of actual work and shall be in a form satisfactory to and approved by the City's attorney.
- 4.3 Insurance: Contractor will, at its own expense, provide and keep in force:
- 4.3.1 Broad Form Commercial General Liability Coverage: Which names the City as additional insured, written on a 'per occurrence' basis and with an aggregate cap no less than three (3) times required limit: \$2,000,000 Combined Single Limit (C.S.L).
 - 4.3.2 Automobile Liability Coverage: including coverage for owned, hired or borrowed vehicles, \$2,000,000 Combined Single Limit (C.S.L.).
 - 4.3.3 Defense of City: All insurance companies shall have the duty to defend the City against liability or property damage claims arising from the conduct of Contractor and/or agents or employees.
 - 4.3.4 Insurance Certification: A Certificate of Insurance shall be required to be filed with the City, certifying coverage and limits of automobile, bodily injury liability, property damage liability and Worker's Compensation.

"The City is named as Additional Insured on the Insurance coverage named herein for the claims arising out of the Company's performance of the contract herein".

- 4.4 Patent/Copyright Liability: Contractor shall save the City harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of the contract.

Penalties: Failure by Contractor to complete all work prior to the date specified herein, April 08, 2022, shall be cause for a penalty payment by Contractor, on request of the Assessor, in the amount of Three Hundred Dollars (\$300.00) per day beyond the specified date of completion, provided the City delivers its responsibilities. This penalty, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, acts of nature or an order of court or other public authority are excepted.

- 4.5 For the purposes of this penalty only, completion of all work not later than April 08, 2022 is defined as follows:



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- 4.5.1 Completed property record cards with all sketches, measurements, listings, pricing, review and final valuations, in pdf format.
- 4.5.2 Any new CAMA software installation, if applicable, should be fully implemented and in use by the City staff by December 31, 2021.
- 4.5.3 Assessment notices, as approved by the Assessor, shall be mailed.
- 4.6 Bankruptcy, Receivership, Insolvency: If Contractor, with the result that it does not pay its debts as they become due, or if a receiver shall be appointed for its business or its assets and not voided within 60 days, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt, then and forthwith thereafter, the City shall have the right, at its option and without prejudice to its rights hereunder, to terminate the contract.
- 4.7 Termination: If either party fails to fulfill in a timely and satisfactory manner their obligations under this agreement, or shall violate any of the covenants, conditions or stipulations of this agreement, which failure or violation shall continue for 30 days after written notice of said failure or violation is received by the offending party, unless the correction of such failure inherently requires a longer period of time and provided further that the applicable party is proceeding diligently to correct the failure, then the opposing party shall thereupon have the right to terminate this agreement by giving written notice to the offending party of such termination and specify the effective date thereof, at least seven (7) days before the effective date of such termination.

In the event of termination, all finished work and documentation, complete and incomplete, shall, at the option of the Assessor, be delivered to the City. Contractor shall be entitled to receive just and equitable compensation for any work performed under this agreement completed prior to the date of termination.

Notwithstanding the above, in the event of termination, neither party shall be relieved of liability by virtue of its breach of this agreement.

- 4.8 Hold Harmless Agreement: Contractor shall state, at all times, to defend, indemnify, protect and save harmless, the City and its officers, agents and employees from any and all claims or demands for damage for bodily injury, including death or property damages sustained by any party, including officers, agents and employees of Contractor. Said hold harmless clause shall include, but not limited to investigation, defense and settlement or payment or judgment of any liabilities.
- 4.9 Severability: In the event any part of any clause or provision of this contract or contract specifications is judicially determined to be unenforceable, it shall be deemed severable from the remainder of that clause or provision and such remainder shall be binding upon the parties to this contract.



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- 4.10 Misrepresentation or Default: The City may void this agreement if Contractor has misrepresented any offering or defaults on any contract with any Rhode Island municipality, or any other state. Contractor shall, also, immediately notify the City of any claim or case formally brought against Contractor.

5 COMPLETION DATE AND TIME SCHEDULE

- 5.1 Signing of Contract: Within 30 days after receipt of notice of acceptance by the City of its bid, as possibly revised by negotiations, Contractor shall execute with the City a contract in the form agreeable to the City and incorporating these contract specifications.
- 5.2 Changes and Subletting of Contract:
- 5.2.1 Changes: Contractor understands that changes in these contract specifications or in the contract will be permitted only upon written mutual agreement of Contractor and the City.
- 5.2.2 Subletting: Contractor shall not assign, sublet and/or transfer the contract or any interest or part therein without first receiving written approval from the City. It shall be mutually agreed and understood that said consent by the City, shall in no way release Contractor from any responsibility as covered in these contract specifications and contract.
- 5.3 Time Schedule: The revaluation work will be started; provided the City delivers maps, present records with owner's addresses, property transfers and building permits at the convenience of Contractor, but no later than July 30, 2021 and will continue in a diligent manner so as to ensure completion within the schedule of completion dates set forth below:
- 5.3.1 Completion Dates: Contractor will complete the following phases of the revaluation in accordance with the following schedule:
- 5.3.1.a Complete preliminary land study and building cost manual by November 19, 2021.
- 5.3.1.b Complete preliminary market rents, expenses and capitalization factors by November 19, 2021
- 5.3.1.c Complete data verification and valuation for building permits issued between January 1, 2021 and September 30, 2021 by November 19, 2021.
- 5.3.1.d Complete and deliver to the Assessor study of market rents, expenses and capitalization factors, land study and building cost manual by January 7, 2022.
- 5.3.1.e Complete data verification and valuation for building permits issued between October 1, 2021 and December 31, 2021 by January 14, 2022.
- 5.3.1.f Deliver completed CAMA database with digital images, property record cards with all measurements, listings, sketches, pricing, and proposed values, on forms approved by the ASSESSOR, to the ASSESSOR by January 21, 2022.
- 5.3.1.g Deliver preliminary valuations by January 21, 2022 and ASSESSOR completes review and final adjustments made for real property no later than February 4, 2022



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- 5.3.1.h Assessment change notices mailed to comply with requirements of Rhode Island State Statutes by February 11, 2022 (CONTRACTOR to pay postage)
- 5.3.1.i Informal review hearings will begin no later than February 16, 2022 and be completed by March 18, 2022.
- 5.3.1.j Results of informal hearings shall be provided to the ASSESSOR to review by March 28, 2022 and the ASSESSOR shall approve no later than March 31, 2022.
- 5.3.1.k Notices of results of informal hearings shall be completed on forms approved by the ASSESSOR and mailed out (CONTRACTOR to pay postage), changes made in the CAMA system and final property record cards printed and delivered to the ASSESSOR in parcel identification order no later than April 1, 2022
- 5.3.1.l Final values and project documentation delivered to the ASSESSOR no later than April 8, 2022.
- 5.4 Assessment Date: The completed appraisals, upon approval of the Assessor, will serve as a basis for assessments, effective on the Grand List of December 31, 2021.
- 5.5 Delays: Contractor shall not be liable for delays caused by reasons of war, strike, explosion, acts of God, order of court or other public authority.

6 PAYMENT SCHEDULE

- 6.1 Periodic Payments: Payments shall be paid in the following manner: 30 days after the execution date of this contract and at the end of each 30 day period thereafter covered by this contract, Contractor will certify, by written progress report to the Assessor, the percentage of total work completed during the said 30 day period. The City will review each report and within ten business days of receipt, either approve it for payment as follows or return it to Contractor with a written statement of reasons for its rejection. Upon determination by the Assessor that Contractor's work during said period is accurate, will pay Contractor a percentage of the total contract price equal to the percentage of work performed less 10 percent, which is to be retained by the City to ensure full and satisfactory performance of the contract. A billing percentage by phase will be submitted to the Assessor for approval prior to commencement of billable work.

If the Assessor determines that Contractor's progress report is inaccurate, the Assessor shall give written notice as stated above, specifying exactly what is unsatisfactory by item, and Contractor shall make every reasonable attempt to correct the inaccuracy. The Assessor shall retain the right to delay payment, only for the specified item, until said item is resolved to the satisfaction of both the Assessor and Contractor. Upon satisfactory resolution, the City shall pay Contractor said amount due, less 10 percent.

Upon certification by the Assessor that Contractor has performed fully and satisfactorily all its obligations and requirements under the contract and/or contract specifications, the retained 10 percent of the contract price will be paid to Contractor.

- 6.2 Suggested Schedule and Percentage of Completed Work:



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The Schedule is to be provided by the Contractor and approved by the Assessor.

% OF TOTAL STAGES OF COMPLETION PROJECT COST

6.2.1	Planning & organization	5%
6.2.2	Data Conversion (optional)	
6.2.3	Data Collection and Data Entry	25%
6.2.4	Residential analysis and valuation	15%
6.2.5	Commercial analysis and valuation	15%
6.2.6	Field review	20%
6.2.7	Informal Hearings Notices & Interviews	15%
6.2.8	Project finalization	5%
6.2.9	TOTAL	100%

7 RESPONSIBILITIES OF CONTRACTOR

- 7.1 Public Relations: Contractor recognizes that good public relations are required in order that the residents and taxpayers of the City may be informed as to the purpose, benefits and procedures of the revaluation program. Contractor shall provide reasonable assistance to the Assessor in conducting a program of public information through the press and other media including meeting with City Officials (Administration and Council), property owner groups, and providing information accessible via online and on paper as a means of establishing an understanding of, and support for, the revaluation program and sound assessment administration. Contractor shall supply visual aids and other media at its disposal to this end. All public releases will be approved by the Assessor prior to any release.
- 7.2 Conduct of Contractor Employees: As a condition of this contract, Contractor's employees will, at all times, treat the residents, employees and taxpayers of the City with respect and courtesy; Contractor shall take appropriate and meaningful disciplinary measures against those who persistently violate such terms of this provision.
- 7.3 Records:
- 7.3.1 General Provision: Contractor will provide all record cards, street cards, owner cards, supplies, equipment, forms, literature and papers to be used in this project at no additional cost to the City.

Contractor may, at its option and at no cost to the City, utilize computers for its information processing, provided that the computer and appropriate machine-readable databases (such as digital storage media) are located in the City, or elsewhere if the Assessor gives his prior written consent with whatever conditions and reservations he may deem appropriate to the interest of the City.



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7.3.2 Additional Supplies : All forms shall be subject to approval by the Assessor as to format, design, content, shape, size, color, quality and quantity.

- 7.3.3.a Records are City's Property: The original or a copy of all records and computations, including machine-readable database, made by Contractor in connection with any appraisal of property in the City shall, at all times, be the property of the City and, upon completion of the project or termination of this contract by the City, shall be left in good order in custody of the Assessor. Such records and computations shall include, but not be limited to:
 - 7.3.3.b Tax maps
 - 7.3.3.c Land value maps
 - 7.3.3.d Materials and wages, cost investigations and schedules
 - 7.3.3.e Property Record Cards with final valuations and separate sketch cards, (if any)
 - 7.3.3.f Sales data
 - 7.3.3.g Capitalization rate data
 - 7.3.3.h Depreciation tables
 - 7.3.3.i Computations of land and building values
 - 7.3.3.j All forms of correspondence including letter or memoranda to individuals or groups explaining methods used in appraisals
 - 7.3.3.k Operating statements of income properties
 - 7.3.3.l Duplicate of hearing determination notices
 - 7.3.3.m Duplicate notice of change.
 - 7.3.3.n All software and documentation for the complete operation of the CAMA System.

7.3.4 Assessor's Records: Contractor will use a system approved by the Assessor for the accurate account of all records and maps which may be taken from the files of the Assessor in connection with appraisal work. All such records and maps shall be returned immediately. None of the Assessor's records shall be taken outside of the corporate limits of the City without prior written permission of the Assessor. The Assessor will provide Contractor access to all computerized data involving property record information, including sketches data and photos.

7.3.5 Property Record Cards: Contractor will provide completed cards in pdf format.

7.3.6 Valuation Information (Property Record Cards): These cards shall contain all manner of information affecting value, including, but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage as applicable, along with unit of value applicable to each, public utilities available, public improvements, zoning regulations in effect as of the assessment date.

7.3.7 Sketches and Photos: Contractor will sketch all physical improvements, giving a listing of all interior and exterior construction details, quality of construction, age, condition,



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replacement values, percent of physical and functional depreciation, depreciated values, fair market value. Sketches of buildings, including dwellings, shall be drawn to scale with dimensions given on the street card. All photos will be reviewed and updated as necessary at the discretion of the Contractor or Assessor.

7.4 Assessment Notices: At the close of the revaluation, a notice shall be sent, at Contractor's expense including envelope by First Class Mail, to each owner of record, setting forth the valuation that has been placed upon the property identified in the notice. Further, enclosed with such notice shall be a letter specifying the dates, times and place of the informal public hearings. Such notices and letters shall be subject to the prior written approval of the Assessor. A database of the pre hearing values will be maintained by the Contractor and provided to the City for comparison with finalized values.

7.5 Informal Public Hearings: At a time mutually agreeable to the Assessor and Contractor, but following completion of all review work by the Assessor and Contractor, Contractor will hold informal public hearings at such times and at such locations as the Assessor may specify so that owners of real property, or their legal representatives, may appear at specified times to discuss with qualified members of Contractor's staff the manner and methods of arriving at value. Informal public hearings, at the Assessor's discretion, may be held on weeknights and Saturdays. **Due to the Covid-19 pandemic hearings may need to be held virtually, by telephone, or in another manner to accommodate CDC and State of Rhode Island guidelines on social distancing and other related precautions.**

Contractor will provide a sufficient number of qualified personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made where warranted. The public hearings shall be completed by March 18, 2022.

Contractor will, at its own expense by First Class Mail, notify each taxpayer who has appeared at an informal public hearing of the results of that hearing as soon as the results are determined, and the form of such notices shall be subject to the prior expressed approval of the Assessor.

7.6 Board of Assessment Appeal: Contractor will have a qualified member or members of its staff with first-hand knowledge of the project and Contractor's duties under the contract, available upon request, for attendance at any deliberations of the Board of Tax Review held after the completion of the revaluation, Sunday's excluded, to assist in the settlement of complaints and to explain the valuations made; but such availability and attendance shall not be required after the date for the completion of the duties of the Board Assessment Appeals with respect to the December 31, 2021 Tax Roll, or for one complete calendar year beyond completion of the revaluation, whichever comes first. This provision applies only to non-residential properties.

7.7 Litigation: In the event of appeals to the courts, Contractor will furnish a competent witness/witnesses with first-hand knowledge of this project and Contractor's duties under the contract to defend the valuation of the properties appraised; it being understood that Contractor shall furnish said witness/witnesses on any court action for 20 days at no charge. Contractor will



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provide supporting data, including written appraisals if deemed necessary by the Assessor, for any said court appeals. Contractor will also comply with any request by the City to answer any interrogatories, provide witnesses for depositions or to otherwise participate in the discovery process pertaining to any litigation described in the first sentence in this paragraph.

Contractor shall not be held responsible for any assessments changed from the original revaluation figure by parties other than Contractor, unless the figure determined by Contractor was unreasonable, unsupportable or erroneous in the view of the Assessor.

7.8 Building Cost Schedules:

7.8.1 General: Contractor will prepare building cost schedules for usage in the program hereinafter specified. These schedules will reflect the unit-in-place method, based upon square foot or cubic foot area of building, as applicable. These schedules shall be used in computing the replacement cost in the City for all residential, commercial, industrial and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees, and all other direct and indirect costs of construction. Before final acceptance, they shall be proven by testing against known sales. All finalized schedules shall be approved by the Assessor before their adoption and usage by Contractor.

7.8.1.a Residential: Residential cost schedules will include schedules for various classifications, types, models and story heights normally associated with the residential buildings. The schedule will be flexible, with special sections reflecting the various additions and deductions for construction components from the base specifications such as insulation, wall and floor types, interior finish, etc., along with prices for different types of heating systems, bathrooms, fireplaces, porches, breezeways, attached and unattached as well as basement garages, and schedules for other building improvements usually found on residential property (swimming pools, barns, sheds, garages, tennis courts, greenhouses, solar designed, etc.)

7.8.1.b Commercial: Commercial building cost schedules shall be prepared in unit costs of materials in place and charted on a per square foot basis and shall be prepared for various story heights and contain all additions and deductions for construction components from base specifications.

7.8.1.c Industrial and Special Structures: Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis, and shall be prepared to contain all the additions and deductions for construction components from base specifications.

7.8.1.d Farm: Cost schedules for farm structures shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to: barns, sheds, silos, milk houses, coops, etc.



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- 7.8.1.e Marine: Cost schedules for all docks and piers prepared by square footage for various types, including but not limited to stationary, floating, and bulkhead.
- 7.9 Depreciation Schedules: The depreciation schedules or methods Contractor will use in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of building according to classification. These schedules or methods shall cover residential, commercial, industrial and farm buildings, and shall be approved by the Assessor prior to their use by Contractor.
- 7.10 Schedules for City: Contractor will supply and leave for the City not less than three copies of all the above required building cost schedules and depreciation schedules for the City's usage, one copy of which shall be turned over to the Assessor upon approval of the schedules, as outlined herein. The schedules shall be in the form of a bound manual.

8 APPRAISAL SPECIFICATIONS

- 8.1 Appraisal of Land: Contractor will appraise all land within the City: residential, vacant, commercial, industrial, agricultural, special use, public utility, tax-stabilized and tax-exempt.

Land and Value Study: Land shall be valued on the basis of an analysis of all sales data occurring during the three year period prior to December 31,2021. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the Assessor.

Contractor shall make a careful investigation of this data and shall consult owners, realtors, banks and other sources of information relative to sales of property within the City. All factors affecting the final value of land shall be considered, such as: location, zoning, inland wetlands, topography, soil condition, size, shape, view, utilities, vacancy, etc.

Contractor will present the results of the land study to the assessor for review and comment.

Non-conforming uses and zoning variances shall be considered in establishing values. A brief description of each lot or parcel of land, together with the valuation computations, shall be entered on the field record.

- 8.1.1 On-site Inspections: Contractor will review all parcels of land and make necessary adjustments in value to compensate for topographical irregularities such as high banks, steep slopes, swamps, irregular shapes or anything else which may detract from the usefulness of the land. Non-conforming uses and zoning variances shall be considered in establishing values.
- 8.1.2 Land Value Units: Contractor will prepare land unit values, subject to the approval of the Assessor, by front foot, square foot, acreage, fractional acreage, or site value, whichever, in the judgment of the Assessor, most accurately reflects the market for the appraised land.



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For waterfront properties Contractor will record front foot of waterfront and depth of water classified as shallow, medium, or deep. Contractor shall take care to maintain any notes or adjustments involving land valuation including but not limited to rights of way, easements, shape, view, etc..

- 8.1.3 Land Value Map: Contractor will delineate the approved land value units on all streets and acreage in the City on two suitable maps to be provided by the City. The land value map shall be returned to the City prior to the completion of the revaluation contract.
- 8.1.4 Neighborhood Delineation: After consideration of the environmental, economic and social characteristics of the City, Contractor will, with the cooperation and approval of the Assessor, delineate "neighborhood" units within the City. Each neighborhood unit will, in Contractor's opinion, exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code which will be used for valuation. These neighborhood numbers shall be recorded and maintained in the computer database and printed on property record cards.

Appraisal of Residential Buildings and Structures:

- 8.1.5 On Site Inspections: The Contractor shall attempt an inspection of all improved sale properties. However, **Due to social distancing requirements created by COVID19, CONTRACTOR must adhere to CDC and Rhode Island COVID19 social distancing guidelines.** The Contractor shall submit to the City, a plan to complete the measure and list process of the sale properties, this can include, notification prior to inspection of the property, data mailers sent to the sale properties, and/or the use of other technology where they can gather accurate and reliable data of the properties. This plan should be included with the bid offer.
- 8.1.6 Field Review: All properties shall be reviewed in the field by Contractor's personnel qualified as reviewers, as previously prescribed in these contract specifications. The properties shall be reviewed for classification, correct listing of information, final value and to assure that they are correlated to comparable properties. The Assessor shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation.
- 8.1.7 Pricing and Valuation:
 - 8.1.8.a Fair Market Value: Pricing and valuation of all land and buildings must reflect the fair market value as of December 31, 2021 and shall be done from and in accordance with the previously approved manuals and schedules and these contract specifications.
 - 8.1.8.b Final Valuation: The final valuation shall be the fair market value of the structure plus the market value of the land; such fair market values to be as approved by the Assessor. In arriving at the fair



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market value of the structures, replacement cost less depreciation from all causes may be considered, along with all other factors affecting the value of the property, all of which shall be noted on the property record.

8.1.9 Comparable Sales - The Contractor shall develop a comparable sales analysis for all residential properties which must be considered in final value reconciliation and must be available during the taxpayer hearing phase.

8.2 Appraisal of Commercial, Industrial, Public Utility and Special Purpose Properties:

8.2.1 General: All sales of commercial, industrial, public utility and special purpose buildings shall be inspected, classified, priced and reviewed in the same manner as residential properties as set forth above, except that the height of the building shall also be recorded on the property record.

8.2.2 Description: All buildings shall be identified and described as to component parts of construction, size, area, age, usage and present occupants(s) on the proper forms, as previously prescribed in these contract specifications.

8.2.3 Income Approach: Income and expense data gathered by the City shall be utilized by Contractor for income producing properties. Any income and expense data, with accompanying summary reports and rent schedules, when used by Contractor shall become the property of the City.

All income and expense information filed and furnished shall not be of public record and is not subject to the provisions of (Freedom of Information) of the Rhode Island General Statutes. From these returns and other data sources, Contractor will establish market or economic rent and expenses for income producing properties. The Contractor shall develop economic models for use in application of the income approach for all commercial, industrial, and special purpose properties.

Contractor shall also develop capitalization rates by investigating sales and income data. Contractor shall establish rates for various classes of property which the City may elect to have checked by bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been approved by the Assessor, Contractor will perform the income approach by using both actual and economic income and expenses.

8.2.4 Yard Improvements: All yard improvements shall be listed and valued separately.

8.2.5 Fixed Equipment: All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and priced in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, Contractor shall bring that question to the attention of the Assessor to be bound by his/her determination.



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8.2.6 Review: A final review and inspection shall be made in the same manner and for the same purposes as prescribed for residential properties. The reviewer shall be competently trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which he/she is responsible.

8.3 Control and Quality Check:

8.3.1 Field Checks by Assessor: The Assessor shall spot check, in the field, properties picked at random by him/her, with or without Contractor's supervisor.

8.3.2 Building Permits: The Contractor shall inspect all properties which had a building permit issued in the past 12 months. The Assessor shall screen and make available to Contractor all building permits or copies thereof issued during the course of the revaluation to determine that all new construction, additions and remodeling have been included in Contractor's appraisals.

8.43 Incomplete Construction: The Assessor's Office will plainly tab, with filing tabs approved by the Assessor, all property cards which have incomplete improvements as of December 31, 2021. The street card shall show the percentage of completion and reflect the percentage of completion in the valuation as of that date.

8.5 **Software:** The City is licensed to utilize the *Appraisal Vision* CAMA Software of Vision Government Solutions Inc. of Hudson, Massachusetts. Vendors will be responsible for securing licensing prior to commencement of the project and should include this fee in their proposal, if the software is utilized, or a fee (if applicable) for the conversation of data into an alternate CAMA database. All data entry, printing of field cards, valuation notices, and letters will be the responsibility of the vendor.

9 RESPONSIBILITIES OF THE CITY

9.1 Nature of Service: It is clearly understood and agreed that the services rendered by Contractor are in the nature of assistance to the Assessor and all decisions as to proper valuations shall rest with the Assessor.

9.2 Cooperation: The Assessor, City and City employees will cooperate with and render all reasonable assistance to Contractor and its employees.

9.3 Items Furnished by the City: The City shall furnish or make available the following:

9.3.1 Maps: The City shall furnish one set of updated City tax maps showing street, property lines and parcel identification numbers. The City shall furnish three maps to be used for neighborhood delineation, two of which shall be returned to the city color coded with



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neighborhood numbers.

- 9.3.2 Land Dimensions: The City shall make available to Contractor lot sizes and total acreage of all pieces of property where the maps or present records fail to disclose measurements or acreage.
- 9.3.3 Zoning: City shall make available current City building zone regulations and zoning map.
- 9.3.4 Record Cards: The City will make available the present property records.
- 9.3.5 Property Transfers: The City will make available to the Contractor property transfer information on a regular basis for input of sales information including but not limited to grantor, grantee, date of sale, sale price, and transfer type into the computer database.
- 9.3.6 Building Permits: The City shall make available all building permits or copies thereof during the course of the revaluation project up to December 31, 2021.
- 9.3.7 Identification: The City shall furnish letters or cards of introduction and authority to inspect real estate in the City.
- 9.3.8 Signing of Communications: The City shall sign, by the Assessor or Chief Executive Officer, communications to be mailed at Contractor's expense for the purpose of contacting a property owner for inspection of the property and for the purpose of obtaining the property owner's income and expense information if such is needed for the income approach to value of commercial or industrial properties.
- 9.3.9 Mailing Address: The City shall make available, through the Assessor's Office, the current mailing address of all property owners.
- 9.3.10 Office Space: The City shall furnish to Contractor sufficient office space to carry out the terms of this contract. If the City is unable to provide space, the City will reimburse Contractor for leased space, subject to the City's approval for appropriateness and cost.
- 9.3.11 Obligation to Keep Current: The City shall continuously and currently update the information specified above.
- 9.3.12 Sales Information: The City shall continuously provide current copies of all sales information available to it with respect to transfer of parcels.

10 TRAINING (OPTIONAL)

- 10.1.1 If the CONTRACTOR is proposing a CAMA conversion, training for staff will be required. Please include a training schedule proposal.



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- 10.2 **Location:** All training shall take place on the City's computer hardware within the City, unless both the City and CONTRACTOR agree to an alternate training site or computer hardware.
- 10.3 **Documentation:** CONTRACTOR will provide a detailed user manual for the CAMA software and Grand List production interface.

11 TRANSMITTAL OF RECORDS TO THE ASSESSOR

Regular periodical delivery of appraisals, as completed and in accordance to a schedule agreeable to the Assessor shall be turned over to the Assessor for review. All appraisals of buildings either completed or under construction and all completed and corrected records shall be turned over to the Assessor as of April 8, 2022. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected in order that the final appraisal of property shall be appraised as of December 31, 2021.

This information and/or appraisals and records shall not be made public until the informal public hearings, except to the extent public access may be compulsory under the provisions of the applicable law.

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the Assessor, unless otherwise provided herein. Contractor, through its supervisor, shall be responsible to the Assessor and, at regular intervals, shall meet with said Assessor to discuss the progress and various other details of the project.

12 OPTIONAL: ADDENDUM – Valuation Services for Utility Property

Although not required, ideally a bidder would be bid on the statistical revaluation for real property and the valuation services for utility property. Attached is the addendum to this RFP which includes a project summary for the valuation services for utility property.



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ADDENDUM: Valuation Services for Utility Property

The purpose of this Addendum is to solicit the services of a qualified vendor to identify and arrive at the full and fair cash value of all ratable utility property, both real and personal, located in the City of Providence as of December 31, 2021. This valuation is for ad valorem property tax assessment purposes.

Also, if requested by the City, the Vendor will assist the City with further consultation as the City negotiates any proposed agreements regarding utility property, both real and personal, located in the City. In undertaking this additional step, the Vendor may be asked to extend its valuation analyses both retrospectively and prospectively to cover the valuation period contemplated by any such agreement. It is anticipated that valuation support will be needed dating back to December 31, 2013. Additionally, if needed, Vendor may be asked to provide expert witness testimony at all appeals to any Court, Board of Tax Assessment Review, or otherwise with respect to its valuation conclusions.

Valuation of utility generation, transmission, and distribution property includes, but is not limited to, the following components:

1. Identification of all utility companies in the City and their assets, including all real and personal property such as generation facilities and transmission/distribution/control facilities;
2. Calculation of the full and fair cash value of each asset owned by utility companies in the City;
3. Calculation of the income-generating ability of each asset owned by utility companies in the City;
4. Cost analysis of the personal property owned by utility companies in the City in accordance with R.I. Gen Laws §§ 44-5-12 and 44-5-12.1.
5. Identification of fee simple owners, tenants, existing lease agreements, other interested parties, and related parties in lease arrangements involving utility companies or their property, where possible.

ADDENDUM PROJECT SUMMARY

The vendor will conduct a Complete Appraisal and prepare a self-contained Valuation Report of the full and fair cash value of all utility property in the City of Providence in accordance with the Bid requirements. All values of related real and personal properties, at its highest and best use, in accordance with Rhode Island Law shall be included.



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DESCRIPTION OF SERVICES – SCOPE OF WORK

1. To conduct a full and fair cash value analysis of all utility property based on the collection of relevant data, services include, but are not limited to:
 - a. Physical plant description, site characteristics, and permit data.
 - b. Market data, capital investment data, and regional economic data.
 - c. Assessment and land use records information.
 - d. Historic cost data, operation and performance data, and plant financial data.
 - e. Real and personal property assets.
2. The Valuation Report will contain the following information:
 - a. Description of the property being valued.
 - b. A discussion of the property's highest and best use.
 - c. For real property, a sales, income, and cost approach in accordance with Rhode Island law.
 - d. For tangible property, a cost analysis, identifying classification and depreciation in accordance with Rhode Island law.
 - e. A statement of purpose of the report.
 - f. Identification of the property rights being valued.
 - g. Definition of fair market value.
 - h. A discussion of the data collection process.
 - i. A statement of assumptions and limiting conditions.
 - j. A statement of the qualifications of the appraiser(s).
 - k. A valuation analysis and market value estimate based on the following approaches:
 1. Reproduction cost new less depreciation.
 2. Replacement cost new less depreciation.
 3. Comparable sales analysis.
 4. Direct capitalization of plant earnings.
 5. Yield capitalization; discounted cash flow analysis of projected earnings.
3. The Consultant must apportion the values of the real and personal properties according to the taxable properties to the appropriate owner. This apportionment could be based on the percentage of value derived from the Cost Approach (Reproduction or Replacement cost new less depreciation), Comparable Sales Approach, or any other methods that are appropriate.
4. The Consultant must provide monthly progress reports to the City Assessor.
5. The Valuation Reports, as well as all other materials, will become the sole property of the City of Providence This will include, but not be limited to, the materials listed below which are related to the Scope of Work:
 - a. Documentation of procedures used throughout the project.
6. Vendor must complete all final valuation reports and submit two (2) printed copies by October 31, 2021.



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7. Proposals shall set forth pricing as follows:
- a. Price for Appraisal effective December 31, 2021;
 - b. Price for extending valuation analysis both retrospectively and prospectively; and
 - c. A separate per diem rate for all negotiation and expert witness testimony assistance.
 - d. All services described in this RFP must be included in the bid, with no exclusions. Bids that do not include Appraisal effective December 31, 2021, extended valuation analysis, and per diem services will be considered non-responsive.

SUPPLEMENTAL INFORMATION FOR ADDENDUM

If the issuing department for this RFP addendum determines that your firm's bid is best suited to accommodate their need, you will be asked to provide proof of the following prior to formalizing an award.

An inability to provide the outlined items at the request of the department may lead to the disqualification of your bid.

*This information is **NOT** requested to be provided in your initial bid that you will submit to the City Clerk's office by the "date to be opened" noted on page 1. This list only serves as a list of items that your firm should be ready to provide on request.*

All bids submitted to the City Clerk become public record. Failure to follow instructions could result in information considered private being posted to the city's Open Meetings Portal and made available as a public record.

You must be able to provide:

1. Business Tax ID will be requested after an award is approved by the Board of Contract and Supply.
2. All vendors must have completed at least six (6) valuations of utility generating facilities within the last six (6) years.
3. All vendors must provide a complete list of client references, two (2) of which must be municipalities for whom you have provided similar valuation services within the last five (5) years. For each client reference, include the name of the agency, the contact person, phone number, project description, project outcome, if the valuation was appealed, and date and timeline of the project. Please make sure that all contacts and phone numbers are current.
4. All Vendors must have experience providing expert testimony in defense of public utility property valuations and be qualified in all valuation approaches.



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5. If a Vendor has had any court cases where the valuation was not upheld, this may be a basis of determining if the Vendor is a responsible bidder.
6. All Vendors must have personnel who will be working on this project who hold the designation of Accredited Appraiser from the American Society of Appraisers.
7. Vendor must provide a time schedule demonstrating how the project will be completed on time. Time schedule must include each task, personnel assigned, and expenditures by task and the total must equal the total bid price.
8. The vendor cannot have any ownership interest in any Power Plant.