

**Solicitation for:  
Personal Property Valuation and  
Maintenance Services  
IFB 19-14  
City of Woburn, Massachusetts**

Posted: January 14, 2019

Due: January 30, 2019 @ 11:00 AM

Questions are due:

January 23, 2019 by 12:00 NOON

[odeluca@cityofwoburn.com](mailto:odeluca@cityofwoburn.com)

Deliver To:

City of Woburn

Purchasing Department

ATTN: Orazio DeLuca, MCPPO

10 Common Street

Woburn, MA 01801

[odeluca@cityofwoburn.com](mailto:odeluca@cityofwoburn.com)



## **SECTION 1.0 INSTRUCTIONS TO OFFEROR**

### **1.1 General**

- When submitting bid, please identify the solicitation title and number clearly on the submitted envelope. All responses must be sealed and delivered to: Purchasing Department, City of Woburn, 10 Common St. Woburn, MA 01801
- Bid(s) submitted must be in original form
- The completion of the following forms and documentation is necessary for consideration of a potential contract award. When submitting documents, please retain the order of documents as originally provided:
  - a. Completed Quality Requirements
  - b. Signed Terms, Conditions and Certifications
  - c. Completed Price Schedule
  - d. Signed Price Schedule
  - e. Completed Certificate of Authority
  - f. Completed Appendix A - Past Performance

NOTE: If Vendor is incorporated, an updated "CERTIFICATE OF GOOD STANDING" from the Commonwealth of Massachusetts may be required for the awarded vendor only. Please review and return with your sealed bids as sent. Also, insure that all forms are completed and your bid response is submitted as requested.

### **1.2 General Information & Submission Instructions**

#### **1.2.1 Bid Delivery**

Responses must be delivered by **January 30, 2019 @ 11:00 AM** to City of Woburn, Purchasing Department, Attn: Orazio DeLuca, MCPPO, 10 Common St. Woburn, MA 01801. One response copy should be submitted. Response must be sealed and marked with the solicitation tile and number. All bids must include a forms items listed in Section 1.1.

#### **1.2.2 Bid Signature**

A response must be signed as follows: 1) if the Offeror is an individual, by her/him personally; 2) if the Offeror is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the Offeror is a corporation, by the authorized officer, whose signature must be attested to by the clerk/secretary of the corporation, and with the corporate seal affixed.

#### **1.2.3 Time for Bid Acceptance**

The contract will be awarded within 30 days after the bid opening. The time for award may be extended for up to 30 additional days by mutual agreement between the City of Woburn and the apparent lowest responsive and responsible bidder (or, for a contract requiring payment, the apparent highest responsive and responsible bidder.)

#### **1.2.4 Bonding Requirements**

Not applicable to this project

#### **1.2.5 Changes & Addenda**

If any changes are made to this solicitation, an addendum will be issued. Addenda will be emailed or faxed to all bidders on record as having picked up the solicitation. No changes may be made to the solicitation documents by the Offerors without written authorization and/or an addendum from the Purchasing Department. It is also the responsibility of the vendor to monitor the City's website for addenda. The web address is: [www.cityofwoburn.com/bids.aspx](http://www.cityofwoburn.com/bids.aspx)

#### **1.2.6 Modification or Withdrawal of Bids, Mistakes, and Minor Informalities**

An Offeror may correct, modify, or withdraw a bid by written notice received by the City of Woburn prior to the time and date set for the bid opening. Bid modifications must be submitted in a sealed envelope clearly labeled "Modification No. \_\_\_" to the address listed in part one of this section. Each modification must be numbered in sequence, and must reference the original solicitation.

After the bid opening, an Offeror may not change any provision of the bid in a manner prejudicial to the interests of the City or fair competition. Minor informalities will be waived or the bidder will be allowed to correct them. If a mistake and the intended bid are clearly evident on the face of the bid document, the mistake will be corrected to reflect the intended correct bid, and the bidder will be notified in writing; the bidder may not withdraw the bid. A bidder may withdraw a bid if a mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident.

#### **1.2.7 Right to Cancel/Reject Bids**

The City of Woburn may cancel this solicitation, or reject in whole or in part any and all bids, if the City determines that cancellation or rejection serves the best interests of the City.

#### **1.2.8 Bid Prices to Remain Firm**

All bid prices submitted in response to this solicitation must remain firm for 60 days following the bid opening.

#### **1.2.9 Unbalanced Bids**

The City reserves the right to reject unbalanced, front-loaded and conditional bids.

#### **1.2.10 Unforeseen Office Closure**

If, at the time of the scheduled bid opening, Purchasing Department is closed due to uncontrolled events such as fire, snow, ice, wind, or building evacuation, the bid opening will be postponed until 2:00 p.m. on the next normal business day. Bids will be accepted until that date and time.

### **1.2.11 Price Submission**

All prices must contain the unit rate as requested on the bid price form in this solicitation. All prices are to include delivery, the cost of fuel, the cost of labor and all other charges related to the products or services listed. Prices are to remain fixed for the contract period of performance.

### **1.2.12 Estimated Quantities**

The City of Woburn has provided estimated quantities for services over the course of the contract period. These estimates are estimates only and not guaranteed.

### **1.2.13 Brand Name “or Equal”**

Any references to any brand name or proprietary product in the specifications shall require the acceptance of an equal or better brand. The City has the right to make the final determination as to whether an alternate brand is equal to the brand specified.

### **1.2.14 Warranty**

The Offeror warrants that (1) the Supplies sold are merchantable, (2) that they are fit for the purpose for which they are being purchased, (3) that they are absent any latent defects and (4) that they are in conformity with any sample which may have been presented to the City. The bidder guarantees that upon inspection, any defective or inferior Supplies shall be replaced without additional cost to the City. The Vendor will assume any additional cost accrued by the City due to the defective or inferior Supplies. The bidder guarantees all Supplies for a period of one (1) year, or as otherwise specified herein.

### **1.3 Questions About the Solicitation**

Questions concerning this solicitation must be submitted in writing to: Orazio DeLuca, Chief Procurement Officer, City of Woburn, Purchasing Department, 10 Common St. Woburn, MA 01801 **before 12:00 NOON on January 23, 2019**. Questions may be e-mailed to [odeluca@cityofwoburn.com](mailto:odeluca@cityofwoburn.com). Written responses will be posted to the Public, City of Woburn website @ [www.cityofwoburn.com](http://www.cityofwoburn.com). If any bidders or proposers contact anyone outside of the Purchasing Department regarding this bid/proposal, that bidder/proposer will be disqualified immediately.

### 1.4 Quality Requirements

The following quality requirements, or basic business requirements, are the minimum set of standards that an entity must meet and certify to be considered responsible and responsive. The

City of Woburn will disqualify any response that does not meet the minimum quality requirements on items 1-4, or a failure to respond to any of the following minimum standards at all.

QUALITY REQUIREMENTS		YES	NO
1.	Contractor shall have a staff of at least ten (10) full time, non-clerical individuals dedicated to providing revaluation services		
2.	Contractor agrees to the following timetable for project completion:  FY 2020 - August 31, 2019  FY 2021 - August 31, 2020  FY 2022 – August 31, 2021		
3.	Project manager dedicated to this contract shall have at least ten (10) years' experience in a project manager capacity relative to personal property valuation		
4.	Contractor shall provide evidence of a minimum of twenty (20) personal property contracts containing at least 1,000 accounts		

### 1.5 Rule for Award

Per M.G.L. c. 30B, the contract will be awarded to one (1) responsible and responsive bidder offering the lowest total price of CLIN 001-003.

## **SECTION 2.0 GENERAL TERMS, CONDITIONS, CERTIFICATIONS**

### **2.1 Bid Offers**

The right is reserved to reject any and all bids or parts of bids and to make an award as may be determined to be in the best interests of the City of Woburn. Bids not submitted in duplicate may be rejected. Bids with erasures or alterations will be rejected.

### **2.2 Prices**

Must be FOB Destination. No charges will be allowed for packing, crating, freight, handling, or cartage unless specifically stated and included with bid.

### **2.3 Awards**

to a bidder may be cancelled if the bidder shall fail to prosecute the work with promptness and diligence.

### **2.4. Payment**

The City of Woburn shall make no payment for a supply or service rendered prior to execution of a written Contract. Bills for services, materials, or supplies furnished by bidders under Contract should be submitted before the first day of the in which payment is to be made to insure payment by twentieth day of that month, except where the allowance for a discount differs from the above. Contractor agrees to submit bills and delivery slips to the City Department in sufficient time for such discounts to be taken advantage of by the City and, in any event, shall not be less than ten (10) days from the submission to the Department of such bills and delivery slips. Time in connection with a discount offered will be computed from the date of delivery to the City, as specified on the order or from the date a correct invoice is received by the using agency of the City, if the latter date is later than the date of delivery.

### **2.5. Guarantees**

The successful bidder shall repair, replace, or make good, without cost to the City, any defects or faults arising within one (1) year after the date of acceptance of articles furnished hereunder resulting from imperfect or defective work done or materials furnished by the Seller.

### **2.6 Patents**

The Seller shall indemnify and save harmless the City and all persons acting for or on behalf of it from all suits and claims against them, or any of them, arising from or occasioned by the use of any material, equipment, or apparatus, or any part thereof, which infringes or is alleged to infringe on any patent rights. In case such material, equipment, or apparatus, or any part thereof, in any such suit is held to constitute an infringement, the Seller within a reasonable time, will, at its expense and as the City may elect, replace such material, equipment, or apparatus, or remove the material, equipment, or apparatus and refund the sums paid.

## **2.7 Legality**

The successful bidder shall comply with all applicable United States, Massachusetts, and/or City of Woburn codes, statutes, ordinances, rules, and regulations.

## **2.8 Taxes**

Purchases made by the City are exempt from Massachusetts Sales Tax and Federal Excise Taxes. Bid prices must exclude any such taxes. Exemption certificates will be furnished upon request.

## **2.9 Bonds**

If this Invitation requires bid surety, the surety shall be in the form of bid bond of a MA Licensed Company, certified check, bank check, money order from a responsible bank, made payable to City of Woburn and must be filed with the original bid at the Office of the Purchasing Agent. Failure to submit surety will cause the bid to be rejected. The bid surety will be returned to the successful bidder within seven (7) days after the execution of the awarded contract and approval by the City of the performance bond. In the case of a default, the bid surety shall be forfeited to the City of Woburn. The successful bidder may be required to furnish a performance bond in an amount and with a MA licensed Surety satisfactory to the City. The Contractor will assume all costs for bonds.

## **2.10 Orders**

Verbal Orders are not binding on the City of Woburn, and any delivery made or work performed without written order or written Contract are at the risk of the Seller or Contractor and may result in an unenforceable claim. The actual needs of City Departments shall govern the actual amount delivered under Contract to be drawn and entered into between the successful bidder and the City. Purchase Orders issued by the City to pay for goods or services shall be made part of Contract.

## **2.11 Indemnity**

Contractor shall agree to Indemnify, Defend, and Hold the City Harmless from any and all claims arising out of the performance of this contract from the negligence, willful acts or omissions of the contractor, its employees, agents, or any sub-contractors.

**2.12. Equality** Where trade names or specific manufacturers are mentioned in the specifications, the City does not intend to limit competition, but merely to indicate the general type of commodity to be supplied. The City invites offers on comparable commodities to those named or described in the specification. Naming of any commercial name, trademark or other identifier shall not be construed to exclude any item or manufacturer not mentioned by name or as limiting competition, but shall establish a standard of equality only. An item shall be considered equal to the item so named or described if:(a) it is at least equal in quality, durability, appearance, strength, and design;(b)it will perform at least equally the function imposed by the general design for the purpose being contracted for or the material being purchased; and(c)it conforms in a substantial way, even with deviations, to the detailed requirements for the item in the specifications. The name and identification of all materials, other than the one named, shall be

submitted to the City in writing for approval, prior to the purchase, use, or fabrication of such items. Subject to the provisions of M.G.L., Ch.30s.39J, or other applicable statute, approval shall be at the sole discretion of the City, it shall be in writing to be effective, and the decision of the City shall be final. The City may require tests of all materials so submitted to establish quality standards at the vendor's expense. All directions, specifications, and advice by the manufacturer for the proper installation, handling, storage, adjustment, or operation of their equipment shall be complied with and the responsibility for the proper performance shall continue to rest with the vendor. Include a written brochure outlining all features of the product offered whenever possible.

### **2.13 Minority Business Enterprise Plan**

Pursuant to M.G.L. c 7, §40N and M.G.L. c. 7, §61, the Supplier Diversity Office ("SDO") (formerly SOMWBA) and the Division of Capital Asset Management ("DCAM") have set revised participation goals for Minority Business Enterprise ("MBE") and Women Business Enterprise ("WBE") participation for affected state funded building projects and state assisted municipal building projects as defined in the above referenced laws and related Executive Orders, including Executive Orders 524 and 526.

Effective January 1, 2012, and until such time as the goals may be revised, the MBE and WBE participation goals for building construction and design awards and expenditures on new projects advertised on or after the effective date will be a combined MBE/WBE goal as follows:

10.4% combined MBE/WBE participation on construction contract awards; and,  
17.9% combined MBE/WBE participation on design contract awards.

Overall annual designations by awarding authorities, as well as MBE/WBE participation on individual projects with a combined MBE/WBE participation goal, must include a reasonable representation of both MBE and WBE firms that meets or exceeds the combined goal. Proposed MBE/WBE participation plans that include solely MBE or solely WBE participation, or do not include a reasonable amount of participation by both MBE and WBE firms to meet the combined goal, will not be considered responsive. Where the prime contractor or designer is an SDO certified MBE or WBE, the prime must bring a reasonable amount of participation by a firm or firms that hold the certification which is not held by the prime contractor or designer on the project. Proposed participation on construction projects or design projects which consists solely of either an MBE or WBE representing 100% of the overall combined goal will not be considered reasonable participation.



The SDO and DCAM will determine whether there is reasonable participation by both MBE and WBE firms on individual projects under their respective oversight. Firms submitting MBE/WBE participation plans which do not provide reasonable participation by both MBE/WBE firms shall be provided an opportunity to revise and resubmit their plans within the time frame set by the awarding authority; however no price adjustments shall be permitted as a result of the revised plan. Firms failing to submit an MBE/WBE participation plan deemed reasonable and accepted by the awarding authority shall not be awarded the contract.

Participation by MBE and WBE firms must be documented, tracked and reported on separately as MBE participation and WBE participation by prime vendors, subcontractors and awarding authorities.

#### **2.14 Right to Know Legislation**

M.G.L., Ch.111F and 454 CMR 21.06 All vendors furnishing substances or mixtures which may be classified as toxic or hazardous, pursuant to MGL,Ch.111F , are cautioned to obtain and read the Law and the Regulations referred to above. Copies may be obtained from the State House Bookstore, State House, Room 117, Boston, MA 02133 for a fee.

#### **2.15 Non-Collusion Affidavit**

M.G.L., Ch.30, s.39M and/or Ch.30B, s. 10 Any person submitting a bid or proposal for the procurement or disposal of supplies or services to any governmental body shall certify in writing on the bid or proposal, as follows: the undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

#### **2.16 State Taxes Paid**

Pursuant to M.G. L. Ch.62C, s.49A, the undersigned certifies that, to the best of their knowledge and belief, they have complied with all the laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

#### **2.17 Bid Offers**

Bid offers will be reviewed and awards made as soon as is possible. Awards will be made within 30 business days from Bid Opening. Offers must be signed to be valid.

#### **2.18 Unit Price**

The case of arithmetical error in any offer involving extension of prices quoted herein, the unit price will govern the final price of quantities offered.

#### **2.19 Insurance**

Contractor shall purchase and maintain coverage for Workers' Compensation, Comprehensive General Liability, including products, completed operations, and contractual liability;

Automobile Liability to protect their employees and others from bodily injury and damages to property which may arise out of or result from the Contractor's operations under this agreement, whether such operations be the Contractor's, any subcontractor, or anyone directly or indirectly employed by any of them. This insurance shall be in limits specified by Law, or as specified in the specifications. In no case shall the limits be less than \$ 1,000,000 in Bodily Injury and in Property Damages. A certificate of insurance naming the City of Woburn as Additional Named

Insured shall be filed with the City prior to the commencement of any contract's operations. All policies and certificates shall contain an endorsement requiring at least thirty (30) days written notice, non-renewal or cancellation of coverage to City of Woburn. Compliance by the Contractor with the insurance requirements shall not relieve the Contractor from liability under the full indemnity provisions contained herein (see 11).

### **2.20 Independent Contractor**

The contractor is neither an agent nor an employee of the City of Woburn and is not authorized to act in behalf of the City of Woburn.

### **2.21 Complete Agreement**

The written contract supersedes all prior agreements or understandings between the parties and shall not be changed unless mutually agreed by both parties in writing.

### **2.22 Assignment / Sub-Contracting**

The Contractor shall not assign any interest in a contract nor engage any other entity, company, subcontractor or individual to perform any obligation to the City without prior written consent of the City of Woburn.

### **2.23 Conflict of Interest**

The bidder certifies that no official or employee of the City of Woburn has a financial interest in this offer or in the contract which the bidder offers to execute or in the expected profit to arise there from, unless there has been compliance with the provisions of M.G.L.,Ch.43, s.27 (Interest in Public Contracts by Public Employees) and of provisions of M.G.L.,Ch.268A,s.20 (Conflict of Interest Law) and that this offer is made in good faith without fraud or collusion or connection with any other person submitting an offer to the City of Woburn.

### **2.24 Termination**

The City of Woburn shall have the Right to terminate this Agreement, if:(A) the Contractor neglects or fails to perform or observe any of its obligations hereunder and cure is not affected by the Contractor within Fifteen (15) Days next following its receipt of a termination notice issued by the City of Woburn, or,(B)a judgment or decree is entered against the Contractor approving a petition for arrangement, liquidation, dissolution or similar relief relating to any bankruptcy or insolvency and such judgment or decree remains unvacated for Thirty (30) Days; or Immediately, if Contractor shall file a voluntary petition in bankruptcy or any petition or answer seeking any arrangement, liquidation or dissolution relating to bankruptcy, insolvency or other relief of debtors, or shall seek or consent or acquiesce in appointment of any trustee, receiver or liquidation of Contractor's property; or (C) funds are not appropriated or otherwise made available to

support continuation of performance in any Fiscal Year succeeding the first year of this Agreement. City of Woburn shall pay all reasonable and supportable costs incurred prior to termination which payment shall not exceed the value of any services provided. NOTICE: The City of Woburn may terminate this Contract or any Purchase Order issued hereunder without cause at anytime, effective upon the termination date stated in the notice of termination. The Contractor shall cease performance upon the stated termination date. If the Contract or any Purchase Order is terminated under this subsection, the Contractor shall be entitled to be paid for supplies and/or services delivered and accepted prior to the notice of termination. In no event shall the Contractor be entitled to be paid for any supplies or services delivered after the effective date of termination.

### **2.25 Return of property**

Upon termination, the Contractor shall immediately return to the City of Woburn, without limitation, all documents ,plans, drawings, tools, equipment, and items of any nature whatsoever supplied to the Contractor by the City, or items developed by the Contractor in accordance with the terms of a Contract with the City of Woburn.

### **2.26 Interpretations of Specifications**

Any prospective bidder that requests an interpretation of existing specifications' terms or conditions must do so within five (5) working days before the scheduled bid opening or defined question due date located with the instructions to bidder. All requests shall be in writing to the Purchasing Agent.

### **2.27 Information**

The submission of a bid offer authorizes the City to contact any and all parties referenced by the bidder in regard to financial and operational information. The City shall have the right to request verification of any information or qualifications submitted as part of any offer to the City.

### **2.28 Price Reduction**

It is understood and agreed that should any price reductions occur between the opening of the bid offers and the completion of the delivery of goods or services that the benefit of all such reductions will be extended to City.

### **2.29 Governing Law**

The offer and any Contract which may ensue shall be governed by the Laws of the Commonwealth of Massachusetts.

### **2.30. Enforceability**

In the event that any provision of this offer or Contract is found to be legally unenforceable, such legal unenforceability shall not prevent enforcement of any other provisions of a Contract.

### **2.31 Samples**

Any qualified bidder may be required to submit samples of the goods offered at the request of the Purchasing Agent. Evaluation for acceptability will be a determining factor in the selection process.

### **2.32 Discrimination**

It is understood and agreed that it shall be a material breach of Contract resulting from this bid offer for the Contractor to engage in any practice which shall violate any provision of M.G.L., Ch.151B, relative to discrimination in hiring, discharge, or, terms or conditions of employment.

**(THIS AREA IS LEFT BLANK INTENTIONALLY)**

## **CERTIFICATIONS**

Statements below shall be submitted with each Bid or Proposal and shall be duly dated and signed with an **original signature** and all other information, or, the Bid or Proposal will be **rejected**.

*In witness whereof, the undersigned certifies, under the pains and penalties of perjury that:*

1. **STATE TAXES PAID:** Pursuant to M.G.L. Chapter 62C, s. 49A, the undersigned certifies that, to the best of my knowledge and belief, have complied with all the laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.
  
2. **CERTIFICATE OF NON-COLLUSION:** M.G.L. C. 30, s. 39M and/or C. 30B, s.10 : Any person submitting a bid or proposal for the procurement or disposal of supplies or services to any governmental body shall certify in writing, on the bid or proposal, as follows: The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.
  
3. **PUBLIC CONTRACTS - DEBARMENT:** M.G.L. C. 550, Acts of 1991: The undersigned certifies that the said "person" is not presently debarred from doing public construction work in the Commonwealth of Massachusetts under the provisions of C. 29, s. 29F, or any other applicable debarment provision of any other Chapter of the General Laws, or any Rule or Regulation promulgated thereunder. Additionally, the undersigned is not presently debarred by any Agency of the Federal Government.
  
4. **HEALTH & SAFETY ON PUBLIC CONSTRUCTION PROJECTS OVER \$ 10000:** Chapter 306 of the Acts of 2004: The undersigned certifies that the firm is able to furnish labor that can work in harmony with all other elements of labor employed or to be employed in the work;(2) that all employees to be employed at the worksite will have successfully completed a course in construction safety and health approved by the U.S. OSHA that is at least 10 hours in duration at the time that the employee begins work and who shall furnish documentation of successful completion of said course with the first certified payroll report for each employee; and(3) that all employees to be employed in the work subject to this bid have successfully completed a course in construction safety and health approved by the U.S. OSHA that is at least 10 hours in duration.
  
5. **COMPLIANCE :** The undersigned is in compliance with all of the provisions, and shall remain in full compliance with the provisions for the life of any Contract resulting from this solicitation. That the bidder is qualified to perform any such Contract and possesses, or shall obtain, all requisite licenses and/or permits to complete performance; shall maintain all

unemployment, workers' compensation, professional and personal liability insurance policies sufficient to cover its performance under any such Contract; and shall comply with relevant prevailing wage rates and employment laws. To the best of its knowledge and belief has paid all local taxes, tax titles, utilities, motor vehicle excise taxes, water and wastewater bills in MA as required by Law.

Print Name \_\_\_\_\_

Circle: Corporation Partnership Individual

Authorized Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Title of Person Signing Bid or Proposal \_\_\_\_\_

Date \_\_\_\_\_

Company Federal ID # or Social Security # \_\_\_\_\_

State of Incorporation \_\_\_\_\_

*Approval of a Contract, or other Agreement, will not be granted unless this form is signed and fully complete.*

**SECTION 3.0  
INVOICING REQUIREMENTS**

**3.1 General**

Each invoice shall be mailed to the designated billing office on a monthly basis at the following address.

<b>Department</b>	<b>Address</b>
Assessor's Department	Woburn Assessor's Department Attn: Andy Creen 10 Common Street Woburn, MA 01801 acreen@cityofwoburn.com

To ensure a proper invoice, the invoice must include the following information and/or attached documentation:

- 1) Name of the business concern, invoice number and invoice date;
- 2) Contract number, or authorization for delivery of property of performance of services;
- 3) Description, price, and quantity and services actually delivered or rendered (or SAR);
- 4) Shipping and payment terms;
- 5) Name (where practicable), title, phone number, and complete mailing address of responsible official to whom payment is to be sent; and
- 6) Other substantiating documentation or information as required by the contract.

Service Activity Report (SAR) shall be submitted along with formal invoice that includes: Date(s) of services, location, quantity, personnel, hours and supplies used. This information should accurately reflect work submitted for payment on formal invoice

## **SECTION 4.0 STATEMENT OF WORK**

### **4.1 City Profile**

The City of Woburn contains approximately 2,000 personal property accounts as of January 1, 2018. All accounts as discussed above are to be listed and collected in accordance with the provisions of this sealed bid. The Board of Assessors utilizes the RRC Personal Property Appraisal Software of Real Estate Research Consultants, Inc. on an in-house basis. Interested Contractors must utilize this appraisal software at an off-site location for the generation of values.

### **4.2 Services to be Performed**

In Fiscal Years 2020, 2021 and 2022, the Contractor will discover, list and value all new personal property within the City. Additionally, the Contractor will undertake a complete street canvass to identify all new and out of business accounts, and will review, analyze and utilize all information received in the form of list process.

**4.2.2** The Contractor shall conform to the usage classifications of all personal property so described, in accordance with Massachusetts General Laws, Chapter 59.

**4.2.3** Any system changes required and updated pricing tables shall be the responsibility of the Contractor. The Contractor shall provide all necessary computer and appraisal consulting services to facilitate any system changes.

### **4.3 Responsibilities of the City**

**4.3.1** The Board of Assessors shall receive a weekly status report from the Contractor. They shall review and evaluate the progress of the project.

**4.3.2** The City shall, as available, provide to the contractor adequate office space including desk, chairs, a telephone and a file cabinet for the duration of the project.



## **4.4 Contractor Responsibilities**

**4.4.1** The contractor will identify owners of personal property located in the City as of January 1, 2019, 2020 and 2021.

**4.4.2** All accounts will be identified as either assessable or non-assessable in accordance with the General Laws of the Commonwealth of Massachusetts.

**4.4.3** On all personal property accounts that are new, as well as those chosen to be collected, a complete and individual inventory listing will be made of all taxable personal property at each site. This listing must contain sufficient detail so that an independent off site value determination may be made. If initially unsuccessful in gaining access, at least two callbacks will be made with record made of the date and time of such visits. For each account of taxable personal property, the contractor will list, and provide the following information:

1. The owner's legal name
2. Business name
3. Business Address
4. Tax Billing Address
5. Type of Business
6. Telephone number
7. Type of Corporation (SIC Code)
8. Tax Status Code
9. Account number
10. Date of on-site inspection
11. Name of contractor's representative who conducted the on-site inspection
12. Complete list of each inventory item that is assessable and taxable as personal property. Included by item shall be the appropriate coding for valuation purposes.
13. Valuation breakdown of accounts by the following categories:
  - A. Inventory
  - B. Furniture and Fixtures
  - C. Machinery and equipment
  - D. Underground utilities
  - E. Other

**4.4.4** The Company shall verify and inspect all accounts taxable, non-taxable or exempt and shall state the reason for each account classified as either non-taxable or exempt. Non-taxable accounts shall be identified with NTV indicating inspection and no indicated value.

**4.4.5** All listings will be as of January 1, and shall reflect the status of all personal property as of that date. All revaluation work shall meet the certification requirements of the Commissioner of Revenue.

**4.4.6** The Company will be responsible for all data entry and report generation.

#### **4.5 Public Information Program**

**4.5.1** The Board of Assessors and the Contractor shall cooperate in maintaining good public relations throughout the period of this project. The Contractor must coordinate all activities necessary to promote public understanding, awareness and cooperation in conjunction with the entire project. The Contractor must be prepared to conduct a public information program that addresses the scope and objective of the project. This program shall continue on a regular basis for the duration of the project.

**4.5.2** All public information activities should emphasize the responsibilities of the various participants, the appraisal methodology employed, and the overall goals of the project.

#### **4.6 Defense of Values**

**4.6.1** The Contractor shall provide expert witnesses, at no cost, to represent the City at all appeals to any Court, Appellate Tax Board, or otherwise, of valuation and/or classifications resulting from this project. All expert witnesses must be approved by the Assessors.

**4.6.2** These services will include the preparation of detailed narrative reports, if required, at a per diem rate to be provided by the Contractor.

## **4.7 Project Timetable**

**4.7.1** Upon award, the Contractor must submit a comprehensive work plan at a minimum addressing the components indicated below and containing the following information for each component: starting date, completion date, and contractor's staff assignments for each year of the contract. The components to be addressed are as follows:

- Project Start Up
- Data Collection
- Coding
- Data Entry
- Valuation
- Assessors Review
- Preliminary Certification Review
- Final Certification Review
- Project Completion

## **4.8 Project Staffing**

**4.8.1** The Contractor must set forth the project staffing to be utilized on this project. At a minimum, the Contractor shall address the following levels:

- Project Director
- Coding Personnel
- Personal Property Listers
- Data Processing Interface

**4.8.2** Each individual, their project duties, the number of work days each will spend on this project and on other projects in which the contractor will be concurrently involved must be broken down into the following categories:

- Name
- Title
- Project Responsibilities
- Man Hours This Project
- Man Hours Other Projects

**4.8.3** The qualifications of each individual set forth above will be provided to the City by submitting full resumes, which must include prior work experience, dates, positions, responsibilities for each employer, education and professional affiliations.

**4.8.4** Since the project staffing is such an integral part of this project, contractors shall contractually commit all individuals as submitted in their bid to this project. Any deviation from the proposed individuals and man hours will constitute a breach of agreement to any contractual agreement which may result from this solicitation.

**4.8.5** Should it become impossible for a contractually committed individual to complete his duties, for a reason such as termination of employment, any change in the contractors staffing as outlined in the bid will be subject to the approval of the City. The City shall notify the contractor within fifteen (15) business days of the acceptance or rejection of any such staff substitutions. Any substituted person must be of an experience level equal to or greater than the person being replaced.

**4.9 Period of Performance**

The period of performance is three (3) years from 05/01/2019 – 12/31/2021

**SECTION 5.0  
PRICING**

The undersigned proposes to supply and deliver the services specified below in full accordance with the solicitation documents supplied by the City of Woburn entitled:

**Personal Property Valuation and Maintenance Services**

The bidder proposes to furnish the services specified at the following price. Please sign offer on following page. Rule for Award: Per M.G.L. c. 30B, the contract will be awarded to one (1) responsible and responsive bidder offering the lowest total price of CLIN 001-003. For the purposes of calculating the contract price only, **the present value of the first three years will be considered the Bid cost for each contract Bid submitted.** In the event of a discrepancy between the total price and the unit price, the unit price will govern.

Prices for CLIN 001 - 003 at the listed quantity will be used to calculate the low bid on a present value basis. The quantity shown are actuals and will represent what the actual program volume will be at any point in the contract period.

The present value calculation is as follows: 
$$PV = \frac{\text{Yearly Price}}{(1 + .02)^{\text{Payment Year}}}$$

**COMPLETE ATTACHED PRICE SHEET AND SUBMIT AS REQUIRED.  
ALSO COMPLETE AND SIGN AREA BELOW**

**NAME OF COMPANY / INDIVIDUAL:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY/STATE/ZIP:** \_\_\_\_\_

**TELEPHONE/FAX/EMAIL:** \_\_\_\_\_

**SIGNATURE OF AUTHORIZED INDIVIDUAL:**

**X** \_\_\_\_\_

**ACKNOWLEDGEMENT OF ADDENDUMS:**

**Addendum #1** \_\_\_\_\_ **#2** \_\_\_\_\_ **#3** \_\_\_\_\_ **#4** \_\_\_\_\_



## **FORMS**

### **6.1 Required Submissions**

**6.1.1** Certificate of Authority

**6.1.2** Insurance Certificate (Post Award)

**CERTIFICATE OF AUTHORITY**

At a duly authorized meeting of the Board of Directors of \_\_\_\_\_  
(Name of Corporation)

held on \_\_\_\_\_ it was VOTED that:  
(Date)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Officer)

of this corporation, be and he/she hereby is authorized to submit bids and proposals, execute contracts, deeds and bonds in the name and on behalf of said corporation, and affix its corporate seal hereto; and such execution of any contract, deed or obligation in this corporation's name on its behalf by such \_\_\_\_\_ under seal of the company, shall be valid  
(Officer)

and binding upon this corporation.

A True Copy,

ATTEST: \_\_\_\_\_

TITLE: \_\_\_\_\_

PLACE OF BUSINESS: \_\_\_\_\_

\_\_\_\_\_

DATE OF THIS CERTIFICATE: \_\_\_\_\_

I hereby certify that I am the clerk of the \_\_\_\_\_  
(Corporation)

that \_\_\_\_\_ is the duly elected \_\_\_\_\_ of  
(Name) (Office)

said corporation, and that the above vote has not been amended or rescinded and remains in full force and effect as of the date of this contract.

\_\_\_\_\_  
(Clerk)

CORPORATE SEAL:



**INSURANCE SPECIFICATIONS**  
**INSURANCE REQUIREMENTS FOR AWARDED VENDOR ONLY:**

Prior to commencing performance of any work or supplying materials or equipment covered by these specifications, the contractor shall furnish to the Office of the Purchasing Director a Certificate of Insurance evidencing the following:

A. GENERAL LIABILITY - Comprehensive Form

Bodily Injury Liability.....\$ One Million  
Property Damage Liability.....\$ One Million

B. COVERAGE FOR PAYMENT OF WORKER'S COMPENSATION BENEFIT  
PURSUANT TO CHAPTER 152 OF THE MASSACHUSETTS GENERAL LAWS IN  
THE AMOUNT AS LISTED BELOW:

WORKER'S COMPENSATION.....\$ Statutory  
EMPLOYERS' LIABILITY.....\$ Statutory

C. AUTOMOBILE LIABILITY INSURANCE AS LISTED BELOW:

BODILY INJURY LIABILITY.....\$ Statutory

1. A contract will not be executed unless a certificate (s) of insurance evidencing above described coverage is attached.
2. Failure to have the above-described coverage in effect during the entire period of the contract shall be deemed to be a breach of the contract.
3. All applicable insurance policies shall read:  
**"CITY OF WOBURN" as a certificate holder and as an additional insured** for general liability only along with a description of operation in the space provided on the certificate.

**Certificate Should Be Made Out To:**  
**City Of Woburn**  
**Purchasing Department**  
**10 Common St.**  
**Woburn, MA 01801**

**Note: If your insurance expires during the life of this contract, you shall be responsible to submit a new certificate(s) covering the period of the contract. No payment will be made on a contract with an expired insurance certificate.**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	
	PHONE (A/C. No. Ext):	FAX (A/C. No):
	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURED	INSURER A :	
	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

**COVERAGES**

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>GENERAL LIABILITY</b>						EACH OCCURRENCE \$
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$
							\$
	<b>AUTOMOBILE LIABILITY</b>						COMBINED SINGLE LIMIT (Ea accident) \$
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						\$
	<input type="checkbox"/> NON-OWNED AUTOS						
	<b>UMBRELLA LIAB</b>						EACH OCCURRENCE \$
	<input type="checkbox"/> OCCUR						AGGREGATE \$
	<b>EXCESS LIAB</b>						\$
	<input type="checkbox"/> CLAIMS-MADE						
	DED						
	RETENTION \$						
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>						WC STATUTORY LIMITS
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						OTHER
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$

ADD "X" HERETO CERTIFY THAT THE CITY OF WOBURN IS AN ADDITIONAL INSURED

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

DESCRIPTION OF PROJECT, SOLICITATION NUMBER AND THAT THE CITY OF WOBURN IS A CERTIFICATE HOLDER AND ADDITIONAL INSURED

**CERTIFICATE HOLDER****CANCELLATION**

CERTIFICATES SHOULD BE MADE OUT TO:

CITY OF WOBURN  
PURCHASING DEPARTMENT  
10 COMMON ST  
WOBURN, MA 01801

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

**APPENDIX A  
PAST PERFORMANCE**

The City requires that the Contractor demonstrate experience providing similar products and/or services in **size, scope and completely** for a minimum of three (3) projects / orders. Three (3) references shall be provided for past performance.

Please use the below format for all references submitted and provide as much detail as possible in the Summary section.

<b>Past Performance / Reference Title:</b>	
<b>Period of Performance</b>	
<b>Contract \$ Value</b>	
<b>Technical &amp; Contractual POC Names &amp; Titles</b>	
<b>Telephone numbers</b>	
<b>Email addresses</b>	
<b>Detailed summary of services provided</b>	