

# RFP 22-10- Personal Property Valuation City of Woburn, Massachusetts

*Posted: February 28, 2022*

*Due: March 15, 2022 @ 11:30 AM*

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

*all bids available: [www.cityofwoburn.com/purchasing/bids](http://www.cityofwoburn.com/purchasing/bids)*

Deliver to:  
City of Woburn  
Purchasing Department  
ATTN: Orazio DeLuca, MCPPO  
10 Common Street  
Woburn, MA 01801  
[odeluca@cityofwoburn.com](mailto:odeluca@cityofwoburn.com)



**CITY OF WOBURN**

**REQUEST FOR PROPOSALS FOR**

**A FY 2023 PERSONAL PROPERTY VALUATION UPDATE**

**AND FY 2024 AND 2025 COLLECTION AND VALUATION SERVICES**

**WITH CITY OPTIONS FOR AN ADDITIONAL TWO YEARS**

## SECTION #1

### PROPOSAL REQUIREMENTS

The City of Woburn, Massachusetts acting through its' Board of Assessors is accepting sealed proposals from all interested contractors for a valuation update of all personal property in Fiscal Year 2023. Subsequent to the valuation update, the Contractor will provide collection and valuation services in Fiscal Years 2024 and 2025. The Contractor will provide City options for the renewal of the contract for an additional two (2) years, for Fiscal Years 2026 and 2027, at the price as quoted for FY 2025.

Sealed proposals will be received and registered in the City of Woburn Purchasing Department, City Hall, 10 Common Street, Woburn, MA 01801 prior to **11:30 AM on March 15, 2022.**

The City of Woburn reserves the right to reject any and all proposals or to waive any informalities in the proposals, if it appears to be in the best interest of the City.

Contractors shall separately submit price and non-price (or technical) proposals in two sealed envelopes. The price proposal, which is attached hereto must be completely filled out signed, placed in an envelope and sealed. The non-price proposal must at the very least address and comply with all minimum requirements set forth in this Request for Proposals in order to be considered responsive. The non-price proposal shall also be signed, placed in a separate envelope, and sealed.

Both the envelopes containing the price and the non-price proposals must be marked with the Contractor's name, date of opening, description of proposal, and either PRICE PROPOSAL or NON-PRICE PROPOSAL.

A bidder may correct, modify or withdraw a bid by sealed written notice clearly marked as a correction, modification or withdrawal and received in the Office of the Board of Assessors prior to the time and date set forth for proposal submission.

In addition to addressing each item 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 contractually bind the Contractor stating that the offer is effective for at least sixty (60) calendar days from the deadline for the submission on proposals.

2. A copy of financial statements for the Contractor's most recent Fiscal Year. The City reserves the right to request additional information relative to the Contractor's financial stability.
3. A list of the municipalities for which the Contractor has provided personal property services, a general description of the specific services provided, fiscal years and client contacts.
4. A list of municipalities for which the Contractor is currently committed to provide personal property services, the services being provided and client contacts.
5. Written assurances that the Contractor has a complete knowledge and understanding of Department of Revenue (DOR) certification requirements and that all work performed shall reflect and comply with the DOR requirements.

## **SECTION #2 SCOPE OF SERVICES**

### **1.0 Profile and other pertinent data regarding the City of Woburn, Massachusetts.**

- 1.1 The City of Woburn contains approximately 2,000 personal property accounts as of January 1, 2022.
- 1.2 All accounts as discussed above are to be listed and collected in accordance with the provisions of this Request for Proposals.
- 1.3 The Board of Assessors utilizes the RRC Personal Property Appraisal Software of Real Estate Research Consultants, Inc. on an in-house basis.
- 1.4 Interested Contractors must utilize this appraisal software at an off-site location for the generation of values.

### **2.0 Services to be Performed**

- 2.1 The Contractor will provide a valuation update of all personal property in the City for Fiscal 2023, for the certification of the Department of Revenue. Additionally, the Contractor will collect and value new and certain existing personal property in Fiscal Years 2024 and 2025.
- 2.2 The Contractor shall conform to the usage classifications of all personal property so described, in accordance with Massachusetts General Laws, Chapter 59.
- 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.

### **3.0 Responsibilities of the City**

- 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.
- 3.2 The City shall, as available, provide to the Contractor adequate office space including desk, chairs, and a file cabinet for the duration of the project.

#### **4.0 Responsibilities of the Contractor**

**4.1** The Contractor will identify owners of personal property located in the City as of January 1, 2022, 2023 and 2024.

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

**4.3** 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** 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.

4.5 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.

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

4.7 Class 504 Public Utilities

The valuation of the Class 504 utilities must be accomplished through the use of the 50/50 methodology which has been supported by the courts. Comprehensive appraisal reports need to be generated, determining the replacement cost new less depreciation by trending, through the use of the Handy Whitman Cost Index, all classes and items of personal property by year, with subsequent determination of depreciation for physical, functional and economic influences. The resulting value will be given equal weight with the net book value of the utility company to establish the final value.

4.8 The Contractor shall provide review and valuation of all locally assessed wireless and CATV accounts for the City of Woburn.

**5.0 Public Information Program**

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.

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.

**6.0 Defense of Values**

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.

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.

## **7.0 Project Timetable**

- 7.1** 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

## **8.0 Project Staffing**

- 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

- 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

- 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.



- 8.4** Since the project staffing is such an integral part of this project, Contractors shall contractually commit all individuals as submitted in their proposal, 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 Request for Proposals.
- 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 proposal 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.

## MINIMUM EVALUATION CRITERIA

In addition to the conditions established in Section #2, The Scope of Services, Contractors must also meet all provisions of the criteria as set forth below in order to qualify for consideration in the Comparative Evaluation Criteria. Any Contractor who does not satisfy this will be specifically rejected as non-responsive. All Contractors must submit all necessary client lists, resumes and other pertinent information in order to evidence levels of experience and competence, in answering all Minimum and Comparative Evaluation Criterion.

- (1) The Contractor must have a staff of at least 10 full-time, non-clerical individuals dedicated to providing revaluation services.
- (2) The Timetable, as proposed, must evidence project completions date for each respective year, on or before the following dates:

Fiscal 2023 -	August 31, 2022
Fiscal 2024 -	August 31, 2023
Fiscal 2025 -	August 31, 2024
- (3) The proposed Project Director must have at least twenty (20) years experience in a Project Director capacity relative to personal property valuation.
- (4) The Contractor must evidence the successful completion of at least twenty (20) personal property projects containing at least 1,000 accounts.

## COMPARATIVE EVALUATION CRITERIA

Contractors who satisfy all provisions of this RFP as set forth herein will be evaluated by the measures as set forth below. All Contractors eligible for rating through this section will be rated for each of the categories through the following distinctions:

- A) Unacceptable
- B) Non-Advantageous
- C) Advantageous
- D) Highly Advantageous

(1) Contractors experience with other Personal Property programs in Massachusetts.

- A) Unacceptable:  
No experience in Massachusetts.
- B) Not Advantageous:  
Less than twenty successful Personal Property revaluations in Massachusetts.
- C) Advantageous:  
More than twenty, but less than fifty successful Personal Property revaluations in Massachusetts.
- D) Highly Advantageous:  
Fifty or more successful Personal Property revaluations in Massachusetts.

(2) Contractor's ability to utilize existing database and appraisal system. Personal Property - The City utilizes the RRC Personal Property Software of Real Estate Research Consultants, Inc., which resides in-house.

- A) Unacceptable:  
No experience utilizing personal property software.
- B) Not Advantageous:  
One successful revaluation utilizing personal property software.
- C) Advantageous  
Ten or more successful revaluations utilizing the RRC Personal Property Software.

- D) Highly Advantageous:  
At least twenty successful revaluations utilizing the RRC Personal Property Software, at least three of which were performed for the City of Woburn.

(3) Qualifications and experience of staff to be assigned to this revaluation assignment.

- A) Unacceptable:  
No revaluation appraisal experience.
- B) Not Advantageous:  
Revaluation experience of some of the staff as a Senior Personal Property Appraiser.
- C) Advantageous:  
Revaluation experience of all of the staff as a Senior Personal Property Appraiser.
- D) Highly Advantageous:  
Revaluation experience of all of the staff as Senior Personal Property Appraiser and experience utilizing the RRC Personal Property Software and at least eight years of direct personal property experience in the City of Woburn.

(4) Qualification and experience of the Project Director.

- A) Unacceptable:  
Less than five years experience in a Project Director or Project Supervisor capacity on Personal Property Projects.
- B) Not Advantageous:  
More than five years experience in a Project Director or Project Supervisor capacity on Personal Property Projects and no supervisory experience in a community of 600 or more accounts.
- C) Advantageous:  
More than ten years of experience in a Project Director or Project Supervisor capacity on Personal Property Projects and supervisory experience in a 600 or more account community.

- D) Highly Advantageous:  
More than twenty years of experience in a Personal Property Project Director capacity, experience in a 2,000 account community, experience on the RRC Personal Property Software and direct personal property experience in the City of Woburn.

(5) Experience of the Contractor

- A) Unacceptable:  
Less than five years in providing Personal Property services in Massachusetts.
- B) Not Advantageous:  
More than five years but less than ten years experience in providing Personal Property appraisal services in the Commonwealth.
- C) Advantageous:  
More than ten years experience in providing Personal Property services within the Commonwealth.
- D) Highly Advantageous:  
At least twenty-five years of experience in providing Personal Property services in the Commonwealth.

(6) Project Timetable

The Timetable, as proposed, must evidence project completions date for each respective year, on or before the following dates:

Fiscal 2023 -	August 31, 2022
Fiscal 2024 -	August 31, 2023
Fiscal 2025 -	August 31, 2024

Any proposal that reflects anything beyond this date will be unacceptable.

**PRICE PROPOSAL - PERSONAL PROPERTY**

This form will be used by the Contractor as their Price Proposal, for the purposes of compliance with Chapter 30B of the Massachusetts General Laws. Contractors must fill out this form for each year of the contract in its entirety and submit it in a separate envelope as their Price Proposal.

**Fiscal 2023**

Listing and Valuation of 500 New and Existing Accounts @ \_\_\_\_\_ /acct = \$ \_\_\_\_\_

Valuation update of the remaining 1,500 existing accounts @ \_\_\_\_\_ /acct = \$ \_\_\_\_\_

Discovery and Form of List Review 20 days @ \_\_\_\_\_ /day = \$ \_\_\_\_\_

Appraisal and review of Wireless and CATV = \$ \_\_\_\_\_

Pricing of two (2) class 504 utilities (per DOR methodology requirements) = \$ \_\_\_\_\_

**Total for Fiscal 2023** = \$ \_\_\_\_\_

**Fiscal 2024**

Data Collection of 500 New and Select Existing Accounts @ \_\_\_\_\_ /acct = \$ \_\_\_\_\_

Discovery and Form of List Review 20 days @ \_\_\_\_\_ /day = \$ \_\_\_\_\_

Appraisal and review of Wireless and CATV = \$ \_\_\_\_\_

Pricing of two (2) class 504 utilities (per DOR methodology requirements) = \$ \_\_\_\_\_

**Total for Fiscal 2024** = \$ \_\_\_\_\_

**Fiscal 2025**

Data Collection of 500 New and Select Existing Accounts @ \_\_\_\_\_ /acct = \$ \_\_\_\_\_

Discovery and Form of List Review 20 days @ \_\_\_\_\_ /day = \$ \_\_\_\_\_

Appraisal and review of Wireless and CATV = \$ \_\_\_\_\_

Pricing of two (2) class 504 utilities (per DOR methodology requirements) = \$ \_\_\_\_\_

**Total for Fiscal 2025** = \$ \_\_\_\_\_

**The City of Woburn retains the right to renew this contract, on an annual basis, for Fiscal Years 2026 and 2027. The price to be utilized for each of these years will be the price as set forth above for Fiscal Year 2025**

The undersigned agrees to furnish the City of Woburn with the entire project as detailed in the Request for Proposals at the price as evidenced above:

Company \_\_\_\_\_

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

Name and Title \_\_\_\_\_

Date \_\_\_\_\_

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Exempt payee  <input type="checkbox"/> Other (see instructions) ▶ _____	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number								

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number								

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

#### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

**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:



## CERTIFICATE OF NON-COLLUSION

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.

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Signature of individual submitting bid or proposal

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Name of Business (please type or print)

## CERTIFICATE OF TAX COMPLIANCE

Pursuant to Massachusetts General Law Chapter 62C, Section 49A, the undersigned acting on behalf of the Contractor\*, certify under penalties of perjury that to the best knowledge and belief, the Contractor\* is in compliance with all laws of the Commonwealth relating to taxes, reporting of employee and contractors, and withholding and remitting child support.

### **Individual**

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Signature Date

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Name (please print or type) Social Security Number

### **Corporate**

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Corporate Name (please print or type)

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Signature of Corporate Officer Date

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Name of Corporate Officer (please print or type) Title

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Taxpayer Identification Number

- As used in this certification, the word "Contractor" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.