

REQUEST FOR PROPOSAL

NOTICE is hereby given that the Borough of South River is inviting responses to a Request for Proposals and will be received as set forth in the attached REQUEST FOR PROPOSALS, REVALUATION SERVICES.

MUNICIPALITY: BOROUGH OF SOUTH RIVER

**RESPONSES TO BE SUBMITTED NO LATER THAN THURSDAY, NOVEMBER 30, 2017,
4:00 P.M.**

ADDRESS FOR RECEIVING RESPONSES: BOROUGH CLERK, PATRICIA O'CONNOR
BOROUGH OF SOUTH RIVER
48 WASHINGTON STREET
SOUTH RIVER, NJ 08882

PROPOSAL FORMS

- PROPOSAL CHECK LIST
- PROPOSAL FORMS
- CONSENT OF SURETY FORM
- NON-COLLUSTION AFFIDAVIT
- DISCLOSURE OF OWNERSHIP STATEMENT
- AFFIRMATIVE ACTION REQUIREMENTS
- STATEMENT OF QUALIFICATIONS
- EXCEPTIONS
- NO RESPONSE SURVEY

INFORMATION OF INTERESTED PARTIES

SPECIFICATIONS & GENERAL PROVISIONS WITH APPENDICES

ALL INFORMATION LISTED ON PROPOSAL CHECKLIST MUST BE SUBMITTED IN A PACKAGE.

ALL FORMS MUST BE TYPEWRITTEN OR WRITTEN IN INK.

ALL SUBMISSIONS MUST BE ONE ORIGINAL PLUS FIVE COPIES

DOCUMENT CHECKLIST

Check the box of each documents that is enclosed

- | | Initial each item
(Vendor's Initials) |
|--|--|
| 1. Proposal Forms to the Borough of South River | [] _____ |
| 2. Appendix A-1 Schedule of Line Items Fee | [] _____ |
| 3. Appendix B-1 – List of Supervisors | [] _____ |
| 4. Appendix C – Background Investigation Release | [] _____ |
| 5. Appendix G – Schedule of Tax Court Appeal Fees | [] _____ |
| 6. Certificate of Consent of Surety Form | [] _____ |
| 7. Stockholder Statement of Ownership | [] _____ |
| 8. Listing of Subcontractors | [] _____ |
| 9. Non-Collusion Affidavit | [] _____ |
| 10. Affirmative Action Questionnaire | [] _____ |
| 11. Statement of Qualifications | [] _____ |
| 12. List of all key employees as of date of proposal indicating name and educational background | [] _____ |
| 13. List of current revaluation projects under contract indicating contract completion date | [] _____ |
| 14. List of revaluation project proposals submitted to municipalities within the past six months | [] _____ |
| 15. Copies of Financial Statements covering two years | [] _____ |
| 16. If applicable, Vendor's acknowledgment of receipt of any notice(s) Or revision(s) or addenda to an advertisement, specifications Or proposal document(s) | [] _____ |
| 17. State of New Jersey Business Registration Certificate | [] _____ |

18. A Statement of whether any litigation involving the firm's performance under revaluation contract has occurred during the past five years and if so, explain in detail the nature of such litigation and the results thereof.

[] _____

Name of Corporation, Partnership, Entity
Or Individual

Print Name and Title of Authorized
Representative of Entity Signing this
Document

Signature of Authorized Representative

Date

ANY CORRECTIONS, ADDITIONS OR DELETIONS SHALL BE INITIALED AND DATED

PROPOSAL FORM
BOROUGH OF SOUTH RIVER
REVALUATION PROJECT

WITH RESPECT TO THE REVALUATION OF ALL REAL PROPERTY SITUATED WITHIN THE BOUNDARIES OF THE BOROUGH OF SOUTH RIVER

INSERT COMPANY NAME

DOES PROPOSE TO UNDERTAKE SAID REVALUATION PROJECT IN ACCORDANCE WITH THE SPECIFICATIONS AND PROVISIONS AT A COST OF

(\$ _____)
DOLLARS

(AMOUNT IN WORDS)

THIS PROPOSAL IS SUBMITTED TO THE BOROUGH OF SOUTH RIVER ON:

DATE: _____

BY: _____

SIGNED BY: _____

TITLE: _____

COMPLETION DATE: _____

OFFICIAL USE ONLY

COMPLY _____

NON-COLLUSION AFFIDAVIT

STATE OF NEW JERSEY:

: SS

COUNTY OF _____ :

I, _____ of the City of _____ in the County of _____ and the State of New Jersey, of full age, being sworn according to law on my oath depose and say that I am _____ (title) of the firm of _____ the vendor making the Proposal for the above named project, and that I executed the said Proposal with full authority so to do; that said vendor has not, directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive proposal submission in connection with the above named project; and that all statements contained in said proposal and in this Affidavit are true, correct, and made with full knowledge that the Borough of South River relies upon the truth of the statements contained in said Proposal and in the statements contained in this affidavit in awarding the contract for said project.

Subscribed and sworn to before me

This _____ day of _____, 20

Notary Public, State of New Jersey

(Signature)

(By)

STATEMENT OF INDIVIDUAL(S) OWNING 10% OR MORE STOCK OR INTEREST

IN THE VENDOR'S BUSINESS ENTITY

In accordance with N.J.S.A. 52:25-24-2, no corporation, partnership, limited partnership, limited liability corporation, limited liability partnership, Subchapter S Corporation or sole proprietorship, shall be awarded a contract unless prior to the receipt of the proposal or accompanying the proposal of the corporation, partnership, limited partnership, limited liability corporation, limited liability partnership, Subchapter S Corporation or sole proprietorship, there is submitted to the Borough of South River, a Statement setting forth the names and addresses of all stockholders who own 10% or more of stock, any class or If all individual partners who own a 10 % or greater interest in the corporation, partnership, limited partnership, limited liability corporation, limited liability partnership, Subchapter S Corporation or sole proprietorship. If one or more such stockholder or partner is itself a corporation or partnership, the stockholders holding 10% or more of that corporation's stock, or the individual partners owning 10% greater interest in that partnership, as the case may be, shall also be listed. The disclosure shall be continued until names and addresses of every non corporate stockholder and individual partner, exceeding the 10% ownership criteria established in this act has been listed. The form shall be submitted with the proposal whether or not a stockholder or partner owns less than 10% of the business submitted the proposal.

Date: _____

LEGAL NAME OF
VENDOR: _____

Check which business entity vendor is:

- Corporation _____ Complete if the vendor is one of the 3 types of Corporations
- Limited Liability Corporation _____ Date Incorporated _____
- Subchapter S Corporation _____ Where Incorporated _____
- Partnership _____
- Limited Partnership _____ NOTE: If no stockholder or partner was
- Limited Liability Partnership _____ 10% or more of the business submitting
- Sole Proprietorship _____ the proposal, please sign and date this form

_____/_____
Signature Date

BUSINESS ADDRESS

_____/_____
Street Address City State Zip

_____/_____
Telephone Fax

Listed below are the names and addresses of all stockholders or individuals who own ten (10) percent or more of its stock of any classes, or who own ten (10) percent or greater interest herein

_____/_____
NAMES ADDRESS

_____/_____
NAMES ADDRESS

_____/_____
NAMES ADDRESS

_____/_____
NAMES ADDRESS

BOROUGH OF SOUTH RIVER
NOTICE TO VENDORS

AFFIRMATIVE ACTION REQUIREMENTS
N.J.S.A.10:5-31 AND N.J.A.C. 17:27

PROCUREMENT AND SERVICE CONTRACTS

“Vendors are required to comply with the requirements of P.L. 1975, c. 127” (N.J.A.C. 17-27)

A. ALL VENDORS

1. Within seven (7) days after receipt of notification of intent to award the contract or receipt of the contract, whichever is sooner, the successful vendor must submit one of the following forms of evidence:
 - a) A Federal Letter of Affirmative Action Plan Approval from the U.S. Department of Labor’s Office of Federal Contract Compliance Programs (OFCCP). This letter cannot be more than one year old from the date of issuance.

OR

- b) A State of New Jersey Certificate of Employee Information Report

OR

- c) A Completed Affirmative Action Employee Information Report (Form AA302).

Please note that the Affirmative Action Affidavit for vendors having less than fifty (50) employees is no longer acceptable.

2. The successful vendor(s) may obtain the Affirmative Action Employee Information Report (AA302) from the Purchasing Division during normal business hours.
3. The successful vendor(s) must submit the white and canary copies of the (AA302) report to the State Affirmative Action Office. The pink copy is submitted to the public agency, and the gold copy is retained by the vendor.

B. The following questions must be answered by all prospective vendors:

1. Do you have a Federal Letter of Affirmative Action Plan Approval? This letter cannot be more than one year old from the date of issuance.

Yes _____ No _____

If yes, please submit a photo copy of such approval

If no,

2. Do you have a State of New Jersey Certificate of Employee Information Report?

Yes _____ No _____

If yes, please submit a photo copy of such approval

If no,

3. Vendors must complete an Affirmative Action Employee Information Report (AA302) obtained from the Purchasing Division during normal business hours.

AFFIRMATIVE ACTION REQUIREMENTS P.L. 1975, c 127 (N.J.A.C. 17:27)

The undersigned vendor certifies that he/she is aware of the commitment to comply with the requirements of P.L. 1975, c. 127 (N.J.A.C. 17:27) and agrees to furnish the required forms of evidence.

The undersigned vendor further understands that his/her proposal must be rejected as non-responsive if said contractor fails to comply with the requirements of P.L. 1975, c. 127 (N.J.A.C. 17:27).

COMPANY _____

SIGNATURE _____

PRINT NAME _____

TITLE _____

DATE _____

**BOROUGH OF SOUTH RIVER
NO RESPONSE PROPOSAL SURVEY
PROPOSAL TITLE: REVALUATION**

If you do not chose to respond to the Proposal, please complete the form below:

Name of Company: _____

Reason you did not respond (Check all that apply)

- Cannot supply product or service
- Cannot meet technical specifications
- Cannot meet delivery specifications
- Cannot meet legal requirements (i.e. performance/security/insurance, etc.)
- Cannot provide a competitive price at this time
- Interest in receiving specifications for informational purposes only
- Insufficient lead time to respond
- Other (Please be specific)

Additional Comments: _____

Signed: (optional) _____

INFORMATION

1B.1 RECEIPT OF PROPOSALS

1B.1.1 OWNER AND PROJECT

Patricia O'Connor, Borough Clerk for the Borough of South River, Middlesex County, New Jersey (herein after called the "Borough") invites response to the Request for Proposals for the project mentioned herein.

1B.1.2 TIME AND PLACE FOR RECEIPT OF PROPOSALS

Proposals will be received the by Borough at the time and place mentioned in the notice. No proposals shall be accepted after time specified.

1B.1.3 INFORMAL PROPOSALS

The Borough may consider informal any Proposal not prepared and submitted in accordance with the provisions hereof and may waive any informalities or reject any and/or all Proposals.

1B.1.4 WITHDRAWING PROPOSALS

Proposals forwarded to the Borough before the time of opening of Proposals may be withdrawn upon written application of the entity making the Proposal who shall be required to produce evidence showing that he is or represents the principal or principals involved in the Proposal.

1B.2 QUALIFICATIONS

Each Proposal shall provide documentation of the qualifications of all field personnel and staff members that will be assigned to this project including the number of employees that will be specifically performing the functions of the project. A minimum as well as a maximum number of employees available and qualified to accomplish the work needed is required.

Field personnel shall be subject to a test as outlined in the Contract documented as well as being interviewed by the Assessor, if necessary.

The Proposal shall include evidence as to the ability to comply with the Contract timetable and must include any or all information to demonstrate their ability to provide the services outlined in the attached documents.

1B.2.1 EXPERIENCE AND CAPTIAL REQUIRED

Any firm or entity submitting a Proposal must be experienced in the kind of work required to be performed, have the equipment required and/or have the means to secure it, and have sufficient capital to properly execute the work within the time allowed.

1B.2.2 UNSATISFACTORY PAST PERFORMANCE

Proposals received from any entity or firm who has previously failed to complete contracts within the time scheduled therefore, or who have performed similar work in an unsatisfactory manner, may be rejected. Any firm or entity that is or was under a lawsuit in regard to a revaluation performed in the past five (5) years shall provide an explanation as to the circumstances of said lawsuit. Failures to do so may be grounds for rejection of said Proposal.

1B.3 PREVAILING WAGE

1B.3.1 REQUIREMENTS OF LAW

If required by law, the Contractor will be required to comply with the provisions of the New Jersey Prevailing Wage Act, Chapter 150 of the Laws of 1963, and any and all statutory requirements of the Local Public Contracts Law.

1B.4 PREPARATION OF PROPOSALS

1B.4.3 COMPLETION AND SUBMISSION OF PROPOSALS

Each Proposal must be submitted in accordance with the requirements set forth in the principal thereof and shall contain the name, address, and telephone number of the entity or firm submitting the Proposal. All prices and amounts must be written in ink or preferably typewritten. All erasures or corrections must be initialed by each signatory to the Proposal. Each Proposal shall be addressed to:

Clerk, Borough of South River
48 Washington Street
South River, New Jersey 08882

And said envelope shall specify the item for which the proposal is submitted and must be delivered at the place and time required or mailed so as to receive on or before the date specified for receipt of Proposals.

The Borough of South River shall not be responsible for Proposals forwarded through U.S. Mail lost in transit at any time before Proposal opening.

The Proposal must be accompanied by (1)

QUALIFICATIONS & CRITERIA FOR REVALUATION RFP & CONTRACT

Qualifications of the Firm

1. The principals of the firm must have five years of practical and extensive appraisal experience in the valuation of the four classifications of property and mass appraisal.
2. Supervisors shall have four years of practical & extensive appraisal experience in the appraisal of the particular types of properties for which they are responsible. Two years of this experience must be in the mass appraisal field and occurred within the last five years. It would be preferable if they have a CTA certificate or an appraisal license either residential or general issued by the State of New Jersey.
3. Field personnel, building enumerators shall have received 150 hours of in-service training pertaining to their particular area of work and be generally aware of the other phases of revaluation work. It would be preferred if they have at least taken some basic appraisal courses.
 - a. The firm shall submit a resume on behalf of all the principals and supervisors assigned to this revaluation program.
 - b. Any changes in personnel under the contract shall be submitted to the assessor and the county board of taxation. Any new field personnel will be required to notify the local police department so they can get the proper identification.

Progress and Control

1. The firm shall commence work with _____ days after the approval of their contract by the Director of the Division of Taxation and shall have completed all of the contract terms except for taxpayer reviews and defense requirements by October 1, 2019. Taxpayer reviews will be completed by December 1, 2019.
2. The firm shall perform the work in accordance with the plan and schedule that is attached to and part of their contract.
3. A written progress report shall be submitted by the firm to the assessor and county board of taxation after review by the assessor on a monthly basis. The report shall indicate the current status of work completed compared to the prior month and to the plan and schedule established in the contract. The firm shall provide the assessor a written explanation where the progress of work is not in conformance with the contract schedule.
4. The progress reports shall serve as a basis for proportional payments by the municipality. A payment schedule based on the completion of the various facets of work shall be attached to the contract. In no event shall the firm bill be more than 90% of the total contract price until full completion and performance of the contract, except for the requirement of tax appeal defense.
5. The assessor at any time will reserve the right to inspect any and all data collected and analyzed by the firm. Along with asking for value estimates of certain neighborhoods when completed.

Public Relations

The firm shall conduct a program of taxpayer orientation and education regarding the revaluation program. The program shall include but not be limited the following:

- a. Press release describing the purpose and nature of the revaluation program after being reviewed by the assessor.
- b. Meetings with the public and or civic groups in the community explaining the purpose and procedure of the revaluation.
- c. Mailings and pamphlets along with information to be posted on the municipal web site at the firm's expense to all property owners explaining the purpose and nature of the scope of the revaluations and setting forth a proposed date for the start of inspections in the municipality.
- d. The firm will notify all property owners at least 10 days prior to the start of field inspections in their neighborhood by U.S. Mail and posting on the Municipal website.
- e. The firm shall provide photograph identification cards to all its representative in the field or otherwise. It will also supply the local police department the make, model and license plate of all its employee's vehicles. The police department may assist in identification cards and or parking decals if warranted.

Standard for the Revaluation

The Firm should comply with the standards and conditions as set forth:

- A. **Standard of Value**- All real property in the Borough of South River shall be valued in accordance with N.J.S.A. 54:4-1 et seq.
- B. **Property under Construction**- The firm shall determine the percentage of completion and the appraised value of the property that is under construction or alteration as of October 1, 2019 preceding the implementation of the revaluation. The firm shall also assist the assessor in the completion of the added assessment list in the year prior to the implementation of the revaluation. (field work & pricing)
- C. **Tax Exempt Property** – A separate list of exempt properties shall be provided to the assessor indicating the new assessed values as if the properties were taxable.
- D. **Qualified Farmland** – Land qualified under the Farmland Assessment Act of 1964 shall be valued in accordance with its qualified value and its highest and best use.
- E. **Three approaches to value** – The three established approaches to value, where applicable, shall be used in appraising all properties in the Municipality:
 1. The most recent edition of the **Real Property Appraisal Manual for New Jersey Assessor**, the latest version of **Marshall & Swift's Commercial Estimator** shall also be used for all commercial properties if approved by the Director of the Division of Taxation.
 2. The firm shall collect and analyze all sales in the Municipality that occurred during the previous three years, in its application of the sales comparison approach. They will include the latest sales in the analysis as possible to complete revaluation on time. The firm shall prepare a sample format that will be used in the application of this approach to value.

3. **Income Approach to Value** – with respect to this approach, the assessor shall facilitate the firm's performance of this approach by requesting a statement on income and expenses as provided under **N.J.S.A.54:4-34** for commercial properties. The firm at its own expense shall mail all appropriate forms (in the name of the assessor's office) via certified mail to all income producing property owners. The firm shall analyze the local market place to derive economic rents and applicable expenses in order to arrive at a supportable indication of value for all types of commercial properties. All supporting data and the income capitalization approach shall be submitted (stapled) to each individual record card. **At the completion and acceptance of the revaluation, the firm shall provide the assessor with all income and expenses (Chapter 91) forms that were mailed out along with an excel spread sheet of the dates mailed and when they were received.**
 4. The three approaches to value shall be reconciled and final supportable estimate of value shall be clearly noted on the property card.
- F. **Property Record Cards** - The Firm shall include real property identification material on properly labeled individual property record cards similar in form and content to those illustrated in the **Real Property Appraisal Manual**. Distinct property records cards for each of the classifications of real property shall be provided. Residential cards shall be white. Commercial cards shall be green and exempt properties shall be another color.
- G. The Firm at the completion and acceptance of the revaluation shall turn over to the assessor is latest updated **CAMA** and **MOD4 Files**. This is to ensure the assessor will have the completed CAMA database to value properties in the future after the completion of the revaluation and to provide revaluation maintenance.
- H. Information Contained on Property Record Cards - The real property identification material to be entered onto the property record cards shall include, but no necessarily be limited to the following:
1. A scaled sketch of the exterior building dimensions which notates story height and how many stories in each section of the sketch.
 2. Notations of the significant building components and measurements as ascertained rom both the interior and exterior inspections.
 3. Entries on the card respecting the values of each lot and building along with the total assessed value of the property. Such items shall be included as age, construction, type of building, condition, depreciation, obsolescence, additions, deductions, recent sales prices, rental data and other pertinent information pertaining to the valuation of the property.
 4. Where more than one property card is required of a particular property, all cards shall be assembled in a standard file folder and properly labeled.
 5. Each property record card shall identify the individual making the inspection and set forth the date the interior inspection was made.
 6. At its own expense, the firm shall take digital photographs of all the properties in the Municipality and attach one to the record card along with providing the

assessor with a digital folder so he can access the photos in the future (CD, zip disk, save in hard drive etc.)

7. A hard card shall be prepared for all properties in the town regardless of property type. The firm shall, after consultation with the assessor, provide him with the final copies of the prepared neighborhood map, sales map and land valuation map used in the calculations of all values at the completion of the revaluation.

Inspection Procedure

The inspection of all properties in the Municipality shall be performed in the following manner:

1. No less than three attempts shall be made to gain entry to each property.
2. If successful entry has not been made after the first attempt. A card shall be left at the property indicating a date and time when a second attempt to gain entry will be made.
3. The card shall include a phone number and address to permit the property owner to contact the firm to make other arrangements if necessary.
4. If entry is not possible upon a second visit, a written notice shall be left advising that an assessment will be estimated unless a mutually convenient arrangement is made for a third visit to gain access.
5. Before setting the final values, the firm shall make phone calls (if possible) or send mailings to all property owner to make a third attempt to gain access to the interior of the property.
6. The firm shall schedule inspections during reasonable hours which include evenings and Saturdays.
7. The Tax Assessor shall be notified in writing of each failure to gain access and a list of all non-entries shall be generated and provided to the Assessor prior to mailing of the value letters.

Taxpayer Review Procedure

1. The firm shall provide all interested taxpayers an opportunity to review the new assessment on their property.
2. The firm, at its own expense, shall mail a written notice, approved by the tax assessor, indicating the new assessed value of their property along with an estimated impact of the taxes that would be owed at the new assessed value and estimated tax rate. It shall also advise taxpayers of their right to attend an individual informal review.
3. Informal reviews shall be held in a designated location within the Municipality and shall be scheduled as to allow the firm enough time to fully review and discuss the proposed assessment with the taxpayer. The Municipality shall provide the location for the reviews to be held and make sure it will be available to allow sufficient time to conduct them.
 - a. Each taxpayer attending a review shall be afforded an individual meeting with a qualified representative employed by the firm.

- b. Sufficient time shall be allotted to conclude reviews on or before December 15th.
- c. A written record of each review shall be provided to the tax assessor in a format approved by him and attached to that taxpayer's property record card.
- d. Suggested revisions by the firm resulting from the taxpayer's review shall be made with the consent of the tax assessor.
- e. Each taxpayer shall be informed, in writing, by the firm of the results of their review within three weeks of their hearing date. Mailings will be at the firm's expense.

Defense of Tax Appeals

The firm shall provide a qualified expert witness in the defense of all County Tax Board appeals filed from the result of the revaluation for a period of three years. This includes the year of implementation of the revaluation and the following two years. It will be at the town's discretion if they want to employ the firm to defend all Tax Court appeals during that time period at an additional hourly rate.

Surety and Insurance Provisions

Prior to the commencement of the contract, the firm shall provide assurance that the Municipality will be adequately protected and held harmless from any lawsuit, litigation, demand or claim arising out of the revaluation contract. In support of the foregoing, and in addition to all indemnification and other coverages required by law, the firm shall provide the following:

1. Worker's Compensation insurance coverage in accordance with standards of this State as set forth in N.J.S.A. 34:15-1 et seq.
2. Public liability and automobile liability insurance not less than those provided by law for any one person and any one occurrence in respect to property damage. Employees must provide proof of automobile insurance on their vehicles if they are to perform field inspections.
3. A performance surety bond in the amount of the contract, executed by a reputable bonding company authorized to do business in this State, subject to 10% of the contract amount upon acceptance of the complete revaluation by the tax assessor. Said reduced amount shall remain in effect until the firm has discharged all of its obligations under the revaluation contract.
4. Error and omission insurance in the amount of at least \$1,000,000.00

Delivery and Summary

1. A Firm shall provide the tax assessor with completed property record cards filed in Block and Lot Sequence for all taxable and exempt properties in the Town. All supporting data, documentation, and special procedures used in deriving values shall also be provided to the tax assessor. This includes any and all land value, sales and neighborhood maps used in deriving values.

2. The firm shall make available a clerical employee to assist the tax assessor in the filing of all hard (paper) property record cards.
3. The firm shall make available a qualified person for the purpose of giving a full explanation and instructions to the assessor and staff with regard to all materials submitted in the final revaluation.
4. A CAMA (Computer Assisted Mass Appraisal) file containing all new values and calculations shall be provided by the firm at the conclusion of the revaluation to the tax assessor in a format consistent with the Current New Jersey Property Tax System.

At no time period of no less than five years after completion of the revaluation, shall the firm, any of its employees or any subsidiary or affiliated companies of the firm, file a tax appeal on behalf of a taxpayer against the Borough of South River.

The Borough of South River shall provide the following to the firm conducting the revaluation:

1. Updated copies of the municipal tax map in full size and 11x17 for the firm's field inspectors.
2. Updated mailing address of all property owners in the town. Usually from the town's current MOD4 File.
3. Temporary office space for the firm's representatives, but no office equipment.