



TOWN OF BALDWIN, MAINE
OFFICE OF THE SELECTMEN
534 PEQUAWKET TRAIL, WEST BALDWIN, ME 04091



REQUEST FOR PROPOSAL TAX ASSESSOR SERVICES

The Town of Baldwin is seeking proposals from qualified individuals or companies to provide property tax assessment services. Services include, but are not limited to preparation and timely filing of assessment documents, abatement and supplemental tax assessments yearly appraisals, market analysis, data entry and consulting as necessary.

Sealed proposals addressed to C/O Selectmen's Office, Town of Baldwin, 534 Pequawket Trail, Baldwin, Maine 04091 and clearly marked "Baldwin Tax Assessor Service Proposal" will be accepted until 12:00 p.m. on December 14th, 2020

The Town of Baldwin reserves the right to reject any or all proposals.

SECTION I: GENERAL INFORMATION

A. Point of Contact

Town of Baldwin
Danielle Taylor, Administrative Assistant
534 Pequawket Trail, Baldwin, Maine 04091
dtaylorbaldwin@gmail.com
Phone: (207) 625-9107 Fax: (207) 625-7780

B. Town Information

The Town of Baldwin has approximately 1525 (2010) residents located in south western Maine, has approximately 956 parcels with a taxable value of \$147,074,538 and approximately 10 personal property accounts with a taxable value of \$7,410,665.

C. Limits of Liability

The Town of Baldwin assumes no liability for any costs incurred by respondents, or in responding to further requests for interview, additional information, etc. prior to issuance of a contract.

D. Type of Contract

Contracted Tax Assessor Agent services for a three (3) year period beginning January 1, 2021 and ending December 31, 2023. A contract for assessor agent services beyond the initial three (3) years will be the subject of direct negotiations with the incumbent or the results of a new RPF.



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E. Questions

Questions about the RFP shall be submitted electronically via email to Danielle Taylor at dtaylorbaldwin@gmail.com.

In the subject line for the email put "Question: Tax Assessing Services." All submissions must contain the name of the person asking the question, address, phone number and email address. Responses will be posted as part of an addendum on the Town of Baldwin website at www.baldwinmaine.org.

F. Solicitation Process

The evaluation team will consist of the Baldwin Board of Selectmen who will review and rank proposals based on the evaluation criteria outlined in Section III-Evaluation Criteria. A short list of respondents may be selected for further evaluation. Only those individuals or firms that are placed on the short list on the basis of the evaluation as judged by the criteria will be considered for interviews. The final contract must be approved by the Board of Selectmen. After all approvals, verification of all requirements, and signatures by appropriate parties, implementation may begin.

G. Conditions of Award

It is in the intent of the Town to award the project to the most qualified and responsive individual or firm, provided that the proposal has been submitted in accordance with the requirements of the RFP. The committee shall be the sole judge of the individual's or firm's qualifications and whether the proposal is in the best interest of the Town. Up to the time of signature of the contract, the Town shall have the right in its sole discretion to reject any and all of the bids, to request and/or negotiate re-bids for the work and to waive any defects, time limits or deficiencies in any bid, and to terminate consideration with or without cause if deemed in the best interest of the Town to do so.

H. Amendments to the RFP

The Town may revise this RFP by using written addenda. Addenda will be posted on the Town's website and emailed to all known bidders.

The Town may request additional information if deemed necessary. Failure to provide such information may result in proposal being considered incomplete. The Town reserves the right to be the sole judge of all such criterion.

I. Insurance Certificates

The individual or firm must be able to provide evidence of the following insurance coverage.



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1. The individual or firm will serve in the capacity of an independent contractor and will maintain insurance at least as hereinafter set forth so as to protect it and the Town from any and all claims for personal injury and property damage, and for claims under the Worker's Compensation Acts, including death arising out of operation of this agreement, for the entire term of the contract.
2. A comprehensive general liability insurance policy with the following limits of coverage:
 - a. Bodily Injury: \$1,000,000 each occurrence
 - b. Property Damage: \$400,00 each occurrence
 - c. \$1,000,000 aggregate of all claims per occurrence
3. A comprehensive automobile insurance policy with the following limits:
 - a. Bodily Injury: \$1,000,000
 - b. Property Damage: \$500,000 per each occurrence
4. All of the insurance must be issued by an insurer licensed, authorized and maintaining an office to do business in Maine

J. Confidentiality

Proposals will be kept confidential until after they have been evaluated. A log will be maintained of proposals received, but proposals will NOT be opened publicly.

SECTION II: PROPOSAL SPECIFICATION

A. The Scope of Services for this RFP is set forth in Attachment A.

B. Bid Response Elements

The following information should be provided in a separate sealed envelope marked "Baldwin Tax Assessor Services Proposal".

Respondents should provide detailed information addressing each of the following areas:

- a. Work History
- b. Contract Work References – Submit three (3)
- c. Qualifications and experience with providing requested services in other communities.
- d. Information regarding any legal action relevant to the requested services that are pending or have been resolved within the past 24 months.
- e. The proposal should reflect the annual cost to provide services outlined in the Scope of Services and any one-time costs required to transition from the town's existing assessing services to the new services if applicable.



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Failure to fully disclose requested information shall be grounds for disqualification. This section shall not be interpreted to require disclosure by State and Federal Statutes and/or court order.

The proposal shall include a draft contract that spells out in detail the services and responsibilities of the assessing agent, the responsibilities of the Town, the contract cost structure and payment plans, and any assumptions related to proposed contract. Proposal must indicate what systems they propose for CAMA, mapping, and/or other services and show evidence of familiarity with all systems by submitting a list of proposer's projects/contracts that use each system or otherwise demonstrate the proposer's ability to adapt the proposed systems and software to the Town's needs. Proposal should highlight the features, costs, and capabilities of the proposed systems and how they would provide a comprehensive and cost effective solution for the Town of Baldwin.

The Town of Baldwin utilizes TRIO financial software modules related to assessing: Real Estate, Personal Property, Tax Billing, Real Estate Collection, and Personal Property Collection.

Baldwin currently posts tax maps and tax commitment books on its website in pdf format to make them readily available to residents.

SECTION III: EVALUATION CRITERIA

1. Evaluation criteria that will be used by the selection team.
 - a. Proof as Certified Maine Assessor (CMA) REQUIRED
 - b. General experience and technical competence (30%)
 - c. Approach to scope of services (15%)
 - d. Value and cost of proposed services that would maximize benefit of the Town (30%)
 - e. Review of reference (5%)
2. Comparative Criteria
 - a. Knowledge and experience with TRIO and proposed mapping software, or similar (5%)
 - b. Experience conducting commercial/residential reevaluations (5%)
 - c. Experience working with Board of Selectmen (5%)
3. Miscellaneous
 - a. Familiarity with Town of Baldwin and its assessed parcels (5%)



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Any contract awarded as a result of this RFP will be awarded without discrimination on the basis of race, color, religion, age, sex, sexual orientation, political affiliation or national origin.

Large scale industry/commercial accounts include:

- Saw Mill with associated drying kilns
- Gravel Pits and Rock Quarrying operations
- Commercial TV and Radio Broadcast Antenna
- Hydro Electric generating facility



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Attachment A

SCOPE OF SERVICES

Nature of work:

This is specialized professional, administrative and technical work in the valuation and assessment of real and personal property in the Town of Baldwin. The Board of Selectmen are the town's elected Assessors.

The Contract Assessor shall be the Assessor's Agent for the Board of Selectmen and shall be responsible for appraising and assessing real and personal property for taxation within the Town, and for the administration and maintenance of all records necessary to administer and maintain the assessment program. Work involves fieldwork in the review of existing and new properties and analytical and administrative work to maintain and update values for properties.

Contractor is required to exercise considerable independent judgment in administering the assessment program within specific state laws and regulations (Title 36, M.R.S.), with some general (non-assessing) guidance from the Board of Selectmen.

Essential Duties and Responsibilities:

Plans, administers, and maintains the assessment system for the Town in maintaining current property valuation through visitation, data collection and analysis.

Appraises residential, commercial, agricultural, and industrial properties; special rights and interests; personal property; and public utility equipment and properties.

Maintains and reviews property transfers; reviews and recommends all abatement and exemption requests for taxes as permitted by the State; makes and enters computation valuations and other data in valuation commitment books; required State reporting forms; maintains the assessing database; and determines the valuations to be placed on new, renovated, and existing property based on changing market value.

Develops and administers a program for the collection of sales, costs, income, and other economic and social data affecting property values; prepares appraisal and other reports as necessary.

Maintains a positive relationship with public and real estate professionals in obtaining information pertaining to the study and sale of real estate.

Deed transfers and research.



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State and local reports.

Assist Tax Collector, Treasurer, and Board of Selectmen with Tax Acquired Properties, special tax assessments, title research, etc.

Provides reports of assessing activity to the Board of Selectmen/Assessors. Written reports submitted monthly and oral reports presented quarterly.

Performs related work as required.

Requirements of Work:

Thorough knowledge of the principles, methods, and techniques of real and personal property assessment and valuation.

Considerable knowledge of the provisions, ordinances, and general law governing real and personal property assessment and statutory exemptions.

Ability to utilize statistical methods to analyze factors which may influence the value of property and to exercise judgment in determining property values and changes in Town structures and physical properties.

Ability to plan and organize the maintenance of assessment and property records to facilitate the preparation of varied assessment roles and reports.

Ability to establish and maintain effective working relationships with taxpayers, the general public, employees, and other departments.

Knowledge of building construction methods and architecture, municipal planning and real estate laws, municipal zoning and tax policy, and the mechanics of real estate sale and finance.

Necessary knowledge of the geographic layout of the Town. Inspections and inventory per Title 36, 328.7 and 328.8.

Training and Experience Required:

Considerable experience in property assessment work involving the appraisal and evaluation of land and buildings, and preferably including some experience in the maintenance of standard office records.

Satisfactory completion of a course of study leading to certification in real property



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appraisal, or graduation from an accredited college program with specialization in property assessment, business or public administration; or any equivalent combination of experience and training.

Necessary Special Requirements:

Possession and maintenance of the designation of Certified Maine Assessor.
Vehicle(s) for use in accomplishment of work.



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Attachment B

REQUEST FOR PROPOSAL TAX ASSESSOR SERVICES

Assessor's Name: _____

Address: _____

Telephone: _____

I have read the "Request for Proposals for Tax Assessor Services" specifications and I submit the following bid prices"

(Year 1) \$ _____

(Year 2) \$ _____

(Year 3) \$ _____

Optional Services:

A. Total cost to perform Town-wide revaluation, if required. \$ _____

B. Other one-time or annual costs (specify each) \$ _____

\$ _____

\$ _____

Other:

The Town of Baldwin will provide an office space, internet/network connection, printer/copier/fax, desk, phone access, and other standard office supplies such as paper and pens for our contract assessor while working in the Town Office.

If I am selected as the winning bidder, I can provide assessing services beginning January 1, 2021 with the intention of setting the tax commitment by August 20, 2021. I will provide written proof of liability and worker's compensation insurance (if applicable) to the Town before the start of work.

Date: _____ Signed: _____

Printed Name: _____

Proposals may be submitted on this bid form (but not required) and must include proof of CMA certification, list of assessing experience, and three business references with contact numbers. Please return proposals to C/O Selectmen's Office, Town of Baldwin, 534 Pequawket Trail, West Baldwin, Maine 04091 and clearly marked "Baldwin Tax Assessor Service Proposal" will be accepted until 12:00 p.m. on December 14th, 2020.