

**HAINES BOROUGH
REQUESTS FOR PROPOSALS
ASSESSING SERVICES**

The Haines Borough, Alaska (hereinafter "Borough") is requesting proposals from qualified Alaskan Assessors or real estate appraisal firms to act as its contractual Assessor for a minimum of one-year term.

The Borough is a home-rule borough and taxes only real property. The Borough has approximately 2,600 parcels of property. Tax records are available online at <https://www.hainesalaska.gov/lands/real-property-tax-rolls>. Additional information may be obtained by contacting:

Alekka Fullerton, Borough Clerk
PO Box 1209
Haines, Alaska 99827
Phone: (907) 766-6402
Fax: (907) 766-2716
Email: Clerk@haines.ak.us

All proposals must be received by:

Proposal due date: December 22, 2023, 4:00 pm AKSD

All proposals must be received at the address and by the time and date shown above. Proposals may be sent, delivered or emailed to Clerk@haines.ak.us. The outside of the envelope, cover sheet or subject line shall state "Assessment Services RFP". Email confirmation of all proposals will be sent within a reasonable time—if you did not receive a confirmation, please call to contact us.

I. Scope of Work:

Assess all taxable real property within the limits of the Borough in the name of the person by whom it is owned, at its full and true value (fair market value) as of January 1 of the tax year, according to Alaska Statutes 29.45.110 and Chapter 3.72 of the Haines Borough Code, including real property of senior citizens and disabled veterans pursuant to AS 29.45.030(e), as well as preparing the assessment roll, reviewing protests filed by property owners, and representing the Borough before the Borough's Board of Equalization.

The purposes of this RFP are: (1) retain a contract assessor to continue updating property assessments; (2) assist in the development and implementation of a CAMA system for the mass appraisal of real property most appropriate for the Haines Borough; and (3) continue training and assisting staff in achieving an independent ability to maintain and modify the assessment system.

II. Proposer Qualifications:

Proposers must have a thorough knowledge of state laws, rules and regulations relating to property tax assessment in Alaska as well as experience in appraising property in Alaska. Proposers must also be able to demonstrate a thorough knowledge of mass appraisal techniques, including computer assisted mass appraisal systems.

All assigned key professional staff must be properly registered / licensed to practice in the State of Alaska. Provide a list of the qualifications, experience and training, including

relevant continuing professional education, of the specific staff to be assigned to this contract. Indicate how the quality of staff over the term of the agreement will be assured.

Proposers shall provide evidence of their expertise, experience, and other factors which should ensure the probable success of the contract.

Proposers shall show they possess sufficient financial resources and personnel to ensure their ability to fully complete the contract.

Successful proposer shall provide proof of at least \$1 million in general liability as well as statutory requirements for Worker's Compensation.

If sub-contractors will be used, proposer should identify them and describe their qualifications and roles in the project. Such sub-contractors, and any consultants and firm specialists mentioned in response to this request for proposal can only be changed with the express prior written permission of the Haines Borough, which retains the right to approve or reject replacements. All sub-contractors shall be required to comply with the insurance requirements identified above.

For Proposers that have been engaged as a Municipal Contract Assessor, provide a list of the most significant engagements (maximum – 5) performed in the last five years that are similar to the engagement described in this request for proposals. These engagements should be ranked on the basis of total staff hours. Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact.

For Proposers that have been engaged primarily as a staff Municipal Assessor, provide the equivalent response to the above paragraph, as appropriate.

III. Specific Project Tasks:

a) The Contract Assessor shall establish the full and true value of all taxable real property located within the Haines Borough to be assessed in the name of the person by whom it is owned on the first day of January each year of the contract.

b) The Contract Assessor shall provide current assessments with new photographs and valuations for all new buildings constructed and assess all changes on existing properties.

c) The Contract Assessor shall establish the full and true value of each possessory interest in properties and exempt entity leases to others on an annual basis.

d) The Contract Assessor shall present a plan for updating the description for each parcel in the Borough showing size, dimensions, construction materials, and other pertinent data as well as a minimum of one exterior photograph.

e) The Contract Assessor shall provide updates to the assessment roll to the Borough Clerk's office no later than March 1st each year of the contract.

f) The Contract Assessor shall be accessible for consultation prior to the Board of Equalization.

- g) The Contract Assessor shall represent the Haines Borough at Board of Equalization hearings.
- h) The Contract Assessor shall conduct a sales ratio analysis (ratio between assessed values and sales prices) to ensure that current appraisals are within 90% to 110% of market value.
- i) The Contract Assessor shall keep the Borough Administration informed of sales ratio analyses or other information which may cause the assessor to make changes to local assessments that would raise or lower assessments greater than 5% in any one year.
- j) The Contract Assessor, after completion of the Board of Equalization hearings, shall assist the Borough Clerk in certifying the final assessment roll.
- k) The Contract Assessor must be accessible to the borough staff throughout the tax year to assist with correcting problems that may arise out of the assessment work.
- l) The Contract Assessor shall assist the Borough in preparing an annual report for the State Assessor.
- m) Assist staff in maintaining the computer assisted mass appraisal system.
- n) Provide training to Borough Assessor-in-training and staff.
- o) All work, paperwork, valuation models, calibration schedules and any other item used to set values, are to become the property of the borough.

IV. Complete Review:

The proposer shall provide a detailed plan for the reassessment of all real property within the Borough, including a timeline for accomplishing this task.

V. Borough Provided Services:

The Borough shall supply the assessor with the existing tax roll (including legal descriptions, maps, plats, building permit applications, ownership records, addresses, etc.), access to existing assessment records (to be maintained by Haines Borough), office space while working on site in Haines, and a computer for both on site and remote work .

It will be the responsibility of the Haines Borough to mail assessment notices and tax bills to property owners, and prepare newspaper notices as required by the Haines Borough Code. It will be the responsibility of Haines Borough to ensure that those appealing assessments to the Board of Equalization, do so on appropriate forms, and to validate properly filed appeals.

The Borough anticipates providing staff support to the Contract Assessor.

VI. Staff Training Requirements:

The proposer shall identify any training needs that may be required for borough staff in the use of any technology, products or services the prospective assessor may employ for this project.

VII. Compensation:

Proposers shall express their fee for the tax year of this proposed contract in a fee schedule to include all labor, materials, transportation costs, meals, lodging, and Board of Equalization expenses. A final scope of work and not-to-exceed fee will be negotiated after the top-ranked firm has been tentatively selected. If the negotiations with top-ranked firm are not satisfactory to the Borough, the Borough reserves the right to terminate negotiations and commence negotiations with the second-ranked firm, and so on.

If it should become necessary for the Haines Borough to request the Contract Assessor to render any additional services to either supplement the services requested in the RFP or to perform additional work as a result of the specific recommendations included in any report issued on this engagement, then such additional work shall be performed only if set forth in an addendum to the contract between the Haines Borough and the firm.

VIII. Incurred Costs:

The Borough is not liable for any costs incurred by the proposer prior to issuance of an approved contract. All costs incurred as a result of responding to this RFP are the sole responsibility of the proposer.

IX. Additional Considerations:

During the evaluation process, the Haines Borough reserves the right, where it may serve the Borough's best interest, to request additional information or clarifications from proposers, or to allow corrections of errors or omissions.

X. Rejection of Proposals:

The Borough reserves the right to: 1) reject any or all proposals; 2) accept the proposal which in its judgment best suits the needs of the Borough; 3) waive any and all irregularities or informalities in any proposal.