



**ASSESSING SERVICES
REQUEST FOR PROPOSALS**

**Proposal Due Date:
Friday, May 30 by 5 PM**

Issued by:

**City of Berkley
3338 Coolidge Hwy
Berkley, MI 48072**



**REQUEST FOR PROPOSALS (RFP) FOR
ASSESSING SERVICES**

The City of Berkley (hereafter “City”) is soliciting proposals from qualified companies or units of government (Company) for the provision of assessing services for the City on an ongoing basis. The City intends for the selected Company to perform the services described in the scope of work below. Responders to this request must have experience in municipal assessing services.

INTENT

The information contained in this Request for Proposals (RFP) is provided to give prospective responders background for completing their responses to this request. In reviewing qualifications, consideration will be given to qualifications, experience, depth, breadth of services, responsiveness, and quality, in addition to billing rates. The City of Berkley is seeking experienced individuals and firms to provide assessing services. The selected firm(s) will be one(s) whose services are judged to best serve the interests of the City of Berkley when billing rates, depth of experience, breadth of services, responsiveness, quality and delivery are considered.

The City of Berkley provides equal employment opportunities to all individuals and does not discriminate in its employment or any other programs or activities based on race, color, religion, sex, sexual orientation, gender identity or expression, national origin, age, genetic information, height, weight, disability, veteran status, familial status, marital status or any other reason, that is unrelated to the person’s ability to perform the duties of a particular job or position, in accordance with applicable federal and state laws.

We provide reasonable accommodation for qualified individuals with a disability, if requested.

The City of Berkley reserves the right to accept or reject any or all bids, waive irregularities, and to accept the bids either on an entire or individual basis that is in the best interest of the City. The City of Berkley accepts no responsibility for any expense incurred by the respondent in the preparation and presentation of a proposal. Such expenses shall be borne exclusively by the respondent. The City of Berkley reserves the right to request additional data, discussion and/or a presentation of the proposal.

OVERVIEW

The selected Company will work within the Treasury/Finance Departments. The Company will plan, administer and provide overall supervision of property appraisal programs for assessment purposes; maintain appropriate levels of qualified staff to ensure work is completed to achieve overall department goals; and be familiar with the laws, regulations and directives regarding the appraisal of real and personal property for assessment purposes within the State of Michigan.

The City has a City Charter and City Code of Ordinances. The City Council is comprised of a Mayor and six council members elected at large. The City has 7,763 parcels to be included in the proposal for assessing services.

SCOPE OF WORK

The Company must have a **Michigan Advanced Assessing Officer (MAAO) Level 4** Assessor on staff to sign the tax rolls and overall work on a contractual basis. The following is a list of the minimum services to be provided:

- Proficient in BS&A/Equalizer software.
- Respond to inquiries from the public, title companies, real estate agents, and other parties regarding assessing issues. Answer telephone calls and respond to walk-in requests for information.
- Explain assessing practices and procedures as necessary.
- Provide on-site support to city staff as necessary.
- Serve as a liaison between the City and prospective business and industry investors; acts as a resource for City citizens by responding to inquiries and interpreting State laws.
- Provide on-site support/office hours for taxpayers/residents/others. Hours required between on-site and remote work are flexible with various options provided in proposal.
- Additional on-site support may be required the prior to and during Board of Review meetings in March, July & December or when annual assessing notices are distributed to residents/business owners.
- Attend, prepare, and work with all Boards of Review – July, December, and March.
- Plan, supervise, and participate in the appraisal, re-appraisal, and assessment of all real and personal properties in the City in accordance with state law and the City Charter.
- Maintain all of the City's assessment rolls, including ad valorem, specific tax rolls (IFTs, PILOTs, DDA TIF, Brownfield TIFs, CRA, NEZ), and special assessments in order to ensure compliance with state law and the City Charter.
- Track captured values in the tax capture districts. Keep the property record field cards up to date.
- Prepare annual assessment notices.
- In consultation with City staff, perform land division and combinations as necessary, complying with the State's Land Division Act and County procedures for land divisions.
- Analyze property sales of all property classes within the City to determine property values and appropriate assessment adjustments, including vacant land values.
- Update and appraise all new construction to determine true cash value and establish new property assessments.

- Process all Principle Residence Exemptions (PREs), rescissions, and Property Transfer Affidavits.
 - Review, provide critical projections, and assist City Staff in processing applications for tax abatement, and other special acts as needed.
 - Process all poverty exemption applications. Hold annual workshops to review poverty exemption applications.
 - File all necessary State and County reports pertaining to the Assessment and Tax Rolls.
 - Annually prepare a report regarding the status of the Assessing Department and the Assessment Roll(s) and present it to City Council. Attend City Council and/or Committee meetings on an as needed basis.
 - Update City personnel with pertinent information on all name and address changes made to the database(s).
 - Keep records up to date with new street addresses, as assigned by the Zoning Administrator.
 - City Engineering Department maintains the City GIS system in coordination with the Assessing Department.
 - Process Personal Property Statements, including conducting an annual inspection to ensure an up-to-date list of personal property.
 - Act as the City's liaison in communicating with the public and other governmental agencies on assessing issues.
 - Represent the City in defense of existing and future assessment appeals to the Board of Review, the Small Claims division of the Michigan Tax Tribunal, and the full Michigan Tax Tribunal.
 - Coordinate with the City's attorney or provide other outside legal recommendations in the defense of those appeals.
 - Prepare changes to the assessment roll based on decisions of the Board of Review, Small Claims Division, and/or Michigan Tax Tribunal.
 - Coordinate with City staff to schedule the Board of Review meetings at City Hall and post the public notices.
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PROPOSAL REQUIREMENTS

The proposal shall include a statement of qualifications. The statement should include the name, address, and brief history of the Company. Contractors interested in applying must include a list of current clients and projects, and a minimum of three references. The City will consider those contractors that, in its sole judgment, demonstrate the skills and abilities to develop effective working relationships with the staff, officials, and public. The respondents should provide a copy of his/her assessor Certification document.

Applicants must email the proposal to finance@berkleymi.gov a hard copy of the proposal (not required) can be sent to the **City of Berkley, c/o Finance Department, 3338 Coolidge Highway, Berkley, MI 48072 no later than the May 30, 2025.**

- Proposals must be received by the Finance Department on the date specified and late proposals will not be considered.
- Proposal must be signed by a responsible agent of the Company and must be valid for 120 days.

In the proposal, please provide the following information:

- Name, address, telephone number and email address of the Company and, the length of time at present location.
 - Name, email and telephone number of Company contact.
 - Number of years the Company has been in business.
 - Statement of Qualifications.
- Brief history of the Company and specialty areas.
- Experience of the Company in contracting with municipalities.
- Municipalities currently contracted.
- Municipalities contracted in the past.
- Staff who will be assigned to City matters, including resume, title, specialty, years of experience, and expected role.
- Board of Review and/or Michigan Tax Tribunal experience of staff who will be assigned to City matters. Minimum of three (3) references, including contact information.
- Insurance - The company must meet the minimum insurance requirements.
 - Comprehensive general liability insurance covering the Company and the City in the project with not less than the following limits of liability; bodily injury or death, \$1,000,000 each person and subject to the same limit for each person; \$1,000,000 for

two or more persons in any occurrence; property damage, \$1,000,000 each occurrence; \$2,000,000 annual aggregate.

- Worker's Disability Compensation Insurance, securing compensation for the benefit of the employees of the Company, as required by Worker's Disability Compensation Act of State of Michigan.
- The Company shall carry professional liability and errors and omissions insurance with not less than \$2,000,000 limit of liability for each claim and in the aggregate including claim expenses. However, the City understands that it cannot be listed an additional insured under this type of policy. Should the City or its officers, directors, employees, and elected officials ever be held financially liable for any error or omission of the Company and seek indemnification from Company as a result thereof, under no circumstance shall the Company's cumulative liability to the City or its officers, directors, employees and elected officials exceed the coverage of the errors and omissions policy referenced herein.
- Provide the name, address and telephone number of three references.
- Any additional data the proposer feels may be helpful in the selection process.
- Bid amounts:
 - *Annual contract amount.* Payments will be made in twelve (12) equal installments due on the fifteenth (15th) day of each month.
 - *Variable billing amounts.* Provide hourly rates for Michigan Tax Tribunal services, and appraisal services. Rates should include clerical costs, transportation costs and all overhead for the Company.
- **Disclosure** - The City of Berkley expects each respondent to identify any potential conflicts of interest and the plan for handling these matters.
- **Understanding of the Scope/Agreement Terms and Conditions:** Provide a statement that indicates you have read and understand the City's intent and agree to the terms and conditions provided in the General Information section below. Any exceptions by the Firm must be clearly stated in this section.
- **Completion of required forms provided by the City of Berkley:**
 - [Non-Discrimination Affidavit](#)
 - [Non-Collusive Affidavit](#)
 - [Conflict of Interest Disclosure Form](#)
 - [Hold Harmless and Indemnity Form](#)

- [Iran Business Relationship Affidavit](#)
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SUBMISSION REQUIREMENTS

All responses to this RFP are must be emailed to the Finance Department on or before **Friday May 30 at 5 PM.** Responses must be clearly marked: “RFP for Assessing Services” and show the respondent’s name and address. Proposals must be provided electronically in a PDF format to finance@berkleymi.gov or if you would like to send a physical copy as well, please address to **City of Berkley, c/o Finance Department, Assessing Services RFP, 3338 Coolidge Highway, MI 48072 by May 30, 2025.**

The City of Berkley reserves the right to accept or reject any and all bids or parts of bids and to waive any and all irregularities, informalities, inconsistencies, and to negotiate contract terms with the successful applicant(s), and to disregard all non-conforming, non- responsive or conditional proposals. The City reserves the right to accept any bid, and price shall not be the sole determining factor.

The City reserves the right to accept part of a bid and reject other parts. Acceptance of any proposal will be based on the level of experience, qualifications, costs and other factors. The City reserves the right to accept a proposal, which it determines in its sole discretion, to be in its best interest.

The City reserves the right to interview any of the bidders prior to accepting a proposal. A successful applicant must agree for all members and employees of the applicant Company to not become involved in the advocacy of the political campaign of any candidate for election to the City of Berkley City Council. In addition to not making any contribution of any kind designed to further the candidacy of any individual seeking election to the City of Berkley City Council. Public or private participation in the advocacy of political candidates for the office of City of Berkley City Council shall be prohibited as a condition of employment.

The City reserves the right to modify or terminate the contract based on significant Company changes.

QUESTIONS PERTAINING TO REQUEST FOR QUALIFICATIONS

All questions regarding this RFP shall be submitted via email on or before May 27, 2025 and should be addressed to azurawski@berkleymi.gov. Should any respondent be in doubt as to the true meaning of any portion of this RFP, or should the respondent find any ambiguity, inconsistency or omission therein, the respondent shall make an emailed request for an official interpretation or correction.