

TOWN OF SIMSBURY

REQUEST FOR PROPOSAL

FOR

ASSESSOR'S OFFICE PERFORMANCE AUDIT

The Town of Simsbury ("Town") is requesting proposals from qualified vendors to provide a performance audit of the Town's Assessor office.

The Request for Proposals (RFP) is available online at:

<http://www.simsbury-ct.gov/finance/pages/public-bids-and-rfp>

The Town of Simsbury reserves the right to accept or reject, without prejudice, any or all proposals or to waive any irregularities therein, or to accept the proposal deemed to be in the best interest of the Town of Simsbury. Award of this project will be based on the best value to the Town and will consider qualifications, cost and any other factors deemed relevant.

Questions regarding this RFP should be directed to Francine Beland – Assessor via email to fbeland@simsbury-ct.gov.

Interested and qualified consultants are to submit electronic submissions to Amy Meriwether, Finance Director, at ameriwether@simsbury-ct.gov by 4:30 P.M. on August 4, 2023. No hard copies will be accepted.

TOWN OF SIMSBURY



**DEPARTMENT OF FINANCE
933 HOPMEADOW STREET
SIMSBURY, CONNECTICUT 06070**

REQUEST FOR PROPOSALS

ASSESSOR'S OFFICE PERFORMANCE AUDIT

Submission Deadline:

Friday, August 4, 2023 at 4:30 P.M.

Submission Contact Information:

Amy Meriwether
Finance Director
Email: ameriwether@simsbury-ct.gov

REQUESTS FOR PROPOSAL ASSESSOR'S OFFICE PERFORMANCE AUDIT

I. INTRODUCTION

A. General Information

The Town of Simsbury is requesting proposals from qualified vendors to complete a performance audit of the Town's Assessor office by evaluating current practices, staffing, policies, and technology. The vendor should also be able to make recommendations for improvement for any identified gaps between current and best practices. The audit should focus on the following objectives:

- Review the Town's ability to support the property assessment process and determine if it meets best practice standards and recommend policy improvements or changes in policies to support the most equitable, efficient, accurate and timely property assessment processes possible.
- Review staffing levels and activities compared to best practice metrics to determine if they maximize efficiency, accuracy and timeliness of assessments, and recommend any changes as appropriate.
- Review information technology systems used by the assessor's office compared to best practices guidelines to identify opportunities to leverage labor with technology and to support efficiency, accuracy and timeliness of assessments.
- Make recommendations for any organizational changes to optimize delivery of assessment services to the public and to support efficiency and ease of work for staff.

The Town seeks a vendor that will demonstrate knowledge of best practices, professional standards, and governing principles in property assessment and valuation, bring experience in conducting best practice studies of other municipalities with documented resulting improvements in service delivery, and can provide examples of identified results.

There is no expressed or implied obligation for the Town of Simsbury to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

To be considered, electronic submissions must be received by Amy Meriwether, Finance Director, at ameriwether@simsbury-ct.gov by **4:30 P.M. on August 4, 2023**. No hard copies will be accepted. The Town reserves the right to reject any or all proposals submitted.

During the evaluation process, the Town reserves the right, where it may serve the Town's best interest, to request additional information or clarification from proposers or to allow corrections of errors or omissions. At the discretion of the Town of Simsbury, vendors submitting proposals may be requested to make oral presentations as part of the evaluation process.

The Town reserves the right to retain all proposals submitted and to use any idea(s) in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance

by the firm of the conditions contained in the request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town of Simsbury and the vendor selected.

It is anticipated the selection of a vendor will be completed by **the week of August 28, 2023**. Following the notification of the selected vendor, a contract will be prepared for review and approval by the Town Manager, on or before **September 1, 2023**. The Town reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any proposal, and to accept or reject any items or combination of items.

II. NATURE OF SERVICES REQUIRED

A. Scope of the Work to be Performed

The Town of Simsbury desires a comprehensive report of the Assessor's office current practices as compared to best practices with recommendations for improvement for any identified gaps.

The selected qualified vendor shall include in their scope of work:

1. A review of current relevant state statutes as well as the town's charter, ordinances, policies, strategic plans, operations manuals, and any other documents or informal procedures that form the framework under which the assessor's office currently operates. Utilize this information to perform a comparison of current operations to best practice guidelines and make recommendations for any changes that would improve the ability of the assessor's office to meet its objectives.
2. Engage all levels of staff involved in property assessment and valuation as well as appropriate elected officials (Board of Selectmen and Board of Finance) to gain a full understanding of current operations and perceptions thereof. The vendor shall summarize the information gathered and identify perceptions and recommendations of the group interviewed in its final report.
3. Review all current assessor's office organization charts, job descriptions, staff count, and vacancy history. Analyze fiscal records, including adopted budgets and position control documents to assess fiscal and staffing resources and compare to benchmark assessor's offices in similar towns, based on population, budget, number of real and personal property accounts, and geographic location.
4. Identify key workload and performance metrics used by the town assessor to assess the performance of the office and its ability to fulfill statutory mandates and its mission and objectives.
5. Identify staffing levels necessary to optimize the delivery of timely, efficient, accurate and equitable property valuation services.
6. Identify effective and appropriate workload distribution among employees of the assessor's office and any contractors.
7. Review the assessor's office information technology infrastructure, including hardware and software, and data base integration (e.g. with the building department) and compare

to best practices, to identify and recommend investments that will ease the work of employees and maximize their efficiency.

8. Identify a statistically significant random sample of residential and business properties, aside from vehicles, and visit each property to determine if the square footage, number of rooms, and condition of the building is fully and accurately reflected in the data base of property assessments. Extrapolate any findings to indicate if and how much property is not assessed or is over-assessed town wide.
9. Develop a Final Recommendations and Options Report that summarizes all findings, comparing current practices to best practices, and describe any recommendations to optimize delivery of property valuation services provided by the assessor's office. Include detailed implementation plans for each recommendation, developed in collaboration with the Assessor's office staff.
10. Create presentation materials to effectively communicate the findings and recommendations contained in the final report to the Board of Selectmen and the Board of Finance.

III. DESCRIPTION OF THE GOVERNMENT

A. Town of Simsbury

The Town of Simsbury was incorporated as Connecticut's twenty-first Town in May 1670. It has a land area of approximately 34.5 square miles and a population of approximately 24,807. Centrally located in the heart of the New York - Boston corridor, Simsbury is an attractive and diverse suburban community. As a part of the beautiful Farmington Valley, Simsbury offers an unmatched quality of life with a traditional New England town atmosphere in a setting of rolling hills, the picturesque Farmington River and extensive trail system. Simsbury is conveniently located 20 minutes northwest of Hartford and 20 minutes southwest of Bradley International Airport. Simsbury operates under a Town Manager-Board of Selectmen form of government with the Town Manager serving as the Chief Executive Officer responsible for overseeing the day-to-day operations of the Town.

The Town operates under the provisions of its Charter and the General Statutes of the State of Connecticut. Since 2017, when the Town established the Town Manager – Board of Selectmen form of government, the legislative power of the Town was vested in a six-member Board of Selectmen, with 5 members elected at large for terms of two years and the First Selectmen being the sixth member elected by vote of the people. The Town Manager, who is the Chief Executive Officer, manages the operations of the Town.

The Town of Simsbury provides a full range of services, including police; the construction and maintenance of highways, streets and other infrastructure; education from pre-kindergarten through high school; social services, a youth service bureau and a senior center; public health services through the Farmington Valley Health District; recreational services and adult education including the Simsbury Farms Recreation Complex and library services while also being served by a fire district and affordable housing through a Town housing authority.

The Assessor's Office administers the Town's property tax program in accordance with Connecticut General Statutes. It is responsible for the discovery, listing and valuation of taxable property including real estate, personal property and motor vehicles. Other responsibilities include maintaining a list of tax-exempt property, administering property exemptions, maintaining tax relief programs, and provide support services to the Board of Assessment Appeals.

The Town of Simsbury has approximately 9,000 taxable parcels (8,400 Residential, 250 Commercial, 30 Industrial, 50 Apartments) with a grand list value of \$3,401,767,901 as of October 1, 2022 for which the Assessor is responsible for maintaining accurate records and assessment values to ensure the property tax burden is equitably allocated. There are approximately 500 non-taxable parcels within Town borders.

B. Magnitude of Finance Operations

The Assessor's Office is headed by Amy Meriwether, Finance Director and consists of 4 employees. The principal functions performed and the number of employees assigned to each is as follows:

Function	Number of Employees
Assessor	1
Assistant Assessor	1
Assessor's Aide	1
Property Appraiser	1

C. Computer Systems

The Town's computer systems are run on a Local Area Network (LAN). The Assessor functions are computerized using a Computer-Assisted Mass Appraisal system (CAMA), eQuality, and is licensed product of Quality Data Service, Inc.

IV. TIME REQUIREMENTS

A. Proposal Calendar

The following is a list of key dates up to, and including, the date proposals are to be submitted:

<u>Date</u>	<u>Activity</u>
July 14, 2023	Request for Proposal issued
August 4, 2023	Due date for proposals (due by 4:30 pm)
Week of August 14, 2023	Oral Interviews (conducted at Town's discretion)
Week of August 28, 2023	Contract awarded by Town Manager

V. PROPOSAL REQUIREMENTS

A. General Requirements

Inquiries concerning the Request for Proposals and the subject of the Request for Proposals must be made to Amy Meriwether, Finance Director at ameriwether@simsbury-ct.gov

CONTACT WITH PERSONNEL OF THE TOWN OTHER THAN THE ABOVE REGARDING THIS REQUEST FOR PROPOSALS MAY BE GROUNDS FOR ELIMINATION FROM THE SELECTION PROCESS.

Submission of Proposal: Electronic copies of the proposal shall be received by the Town's Finance Director via email **by 4:30 p.m. on August 4, 2023** for a proposal to be considered. The Proposal should address the items listed in the following section B.

The proposal should be sent to ameriwether@simsbury-ct.gov.

B. Proposal Package

1. Title Page showing the request for proposals subject; the vendor's name; the name, address and telephone number of the contact person and the date of the proposal.
2. Table of Contents identifying the materials submitted by section and page number. Cross-referencing to section and page number in the RFP would be helpful.
3. Proposal Program that addresses all RFP requirements as specified in the Scope of Services. Included shall be a clear description detailing how the proposer intends to customize their work to address the Town's specific needs and describe in detail the services to be performed under this contract.
4. Statement of Qualifications for the organization and key personnel who will be fully responsible for the account. Provide a resume or brief statement of professional qualifications, related educational background and professional certifications of the personnel assigned to this account.
5. Detailed schedule of work to be performed and timeframe it which it will be performed.
6. Pricing proposal that addresses all elements of the proposed services detailed herein.
7. At least 3 references, preferably for a similar size town

VI. EVALUATION PROCEDURES

A. Review of Proposals

Town staff and Board of Finance members, consisting at a minimum of the following, will evaluate submitted proposals:

Lee Erdmann, Interim Town Manager
Amy Meriwether, Finance Director
Francine Beland, Assessor
One Board of Finance Member

B. Evaluation Criteria

Proposals will be evaluated using the following criteria:

1. Program Proposal
2. Qualifications and Experience
3. Price Proposal
4. Oral Presentation/Interview – the Town may require proposers to give oral or visual presentations in support of their proposals