



Office of the City Manager  
City of Caribou  
25 High Street  
Caribou Maine 04736  
(207) 493 – 5961  
pthompson@cariboumaine.org  
www.cariboumaine.org

## Request for Proposals (RFP) Assessment Services

### SUMMARY

The City of Caribou is seeking proposals from qualified assessment firms/individuals to provide annual assessment services for the City of Caribou, Maine, (hereafter, referred to as “City”) located in Aroostook County, for the 2022 assessment rolls. The City is seeking a firm/individual to serve as its assessor’s agent. The scope of work is to provide annual maintenance work in a competent, timely, efficient, cost-effective and customer service-oriented manner.

### BACKGROUND

The following are given for Tax Year 2021, assessment date 4-1-2021.  
By city charter, the annual tax rate must be set annually before June 30.

Total Taxable valuation of real estate:	\$336,622,500
Total Taxable valuation of personal property:	\$ 13,413,300
Total exempt value of all BETE qualified property:	\$ 14,566,400
Number of BETE exemptions approved:	315
Number of homestead exemptions granted:	2,026
Number of Veteran exemptions granted:	306
Solar and wind energy exemption applications:	3 parcels / \$1,280,600 exempt
Tree Growth tax law program parcels:	26 parcels / 1,484 acres
Farmland and open space program parcels:	8 parcels / 1,020 acres
Number of real estate accounts:	4500
Number of personal property accounts:	500
Number of Tax Increment Financing (TIF) districts:	4 districts / 694 parcels
Approximate number of annual real estate transfers:	315
Number of building permits in calendar year 2021:	68
Number of demolition permits in calendar year 2021:	20

Last full revaluation by RJD Appraisal. Values committed for April 1, 2012.

## **TERM OF ENGAGEMENT**

Applicants are encouraged to carefully inspect the community and facilities of the City, and judge for themselves, the circumstances affecting the cost of the work and the time requirements for its completion. Failure to do so will not relieve the assessor of the obligation to furnish and perform the work, to carry out the provisions of the contract or to complete the contemplated work for the consideration set forth in the proposal in a timely manner. Questions regarding desired services or general operations are to be directed to:

City of Caribou  
Penny Thompson, City Manager  
25 High Street  
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Values will be set as of April 1, 2022, per state of Maine statute. According to the Charter of the City of Caribou, the City Council will set the annual rate of taxation on or before June 30. This proposal is for the 2022 assessment roll (estimated to be completed on or before June 10, 2022). In addition, the bidder must be willing to answer questions/defend the tax roll if needed beyond the completion of the roll as needed for tax appeals, at a minimum for 185 days following commitment.

## **ASSESSMENT SOFTWARE**

The City of Caribou utilizes Trio software for assessment roll work. City will give preference to the firm/individual who possesses knowledge and experience in Trio software.

## **SCOPE OF WORK**

1. The assessor shall be responsible for all work performed to properly and professionally assess and defend values for the real and personal property of the City in accordance with applicable statutes of the State of Maine and in full compliance with all rules and regulations officially adopted and promulgated by Maine Revenue Services. The individual shall be a Certified Maine Assessor with a minimum of three (3) years of experience. The individual designated as such shall be available to the City for the entire contract. Should the designated person be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City. The assessor shall be accountable and report to the City Manager or designee. The assessor shall meet with the City Manager or designee on a regularly scheduled basis as applicable (not less than monthly) to discuss the progress of the work and to review the data and the reports completed. The City reserves the right to inspect the data and the progress of the work performed at any time without limitation.
2. The assessor will provide a phone number and email address for City officials to contact the assessor during regular business hours, Monday through Friday, 8:00 am-4:30pm, and shall respond to assessment issues within twenty-four (24) hours. The assessor will be required to schedule and work with the City Manager to schedule Board of Assessor's meetings as needed. The assessor will be required to attend Board of Assessor's meetings as needed. In addition, the assessor may be required to attend City Council meetings as requested by the City Manager.

3. Primary responsibilities are to process all property transfers, record parcel splits and combinations on the City tax maps, discover, list, and measure new value through the building permit process, remove value of demolished structures, value all mobile homes in parks, review and approve or deny applications for exemption and current use parcels, provide captured values for all parcels in the City Tax Increment Financing districts, review and recommend abatement approvals and denials to the Board of Assessors, address taxpayer concerns, and complete required paperwork. This will include the MRS Ratio Declaration, tax rate calculation form, Maine Forest Service Tree Growth Roster, Municipal Valuation Return and MRS Turn-Around document.
4. The assessor will conduct a field review and inspection of all properties that were under partial construction as of April 1, 2021. The assessor will conduct a field review and inspection of new construction as of April 1, 2022. The assessor will conduct interior inspections on all newly constructed homes, partially constructed homes from the previous year, any interior remodeling project requiring a building permit. The assessor will conduct a field visit and measurement of all properties with building permits for exterior remodeling and for detached buildings and decks, and other miscellaneous permits. The assessor will provide a digital photo of all properties visited.
5. The assessor will provide a copy of all notes on properties reviewed and inspected. All assessment files and records created, and data collected by the assessor shall remain the property of the City. Records removed for work in progress shall be returned to the City offices.
6. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public. All assessment personnel shall carry proper photo identification provided by the city to assure the public of their identity and purpose for gaining access to private property. The assessor is not permitted to assign, subcontract, or transfer the work without the written permission of the City.
7. The assessor will provide own transportation for conducting field review. The assessor shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error, or omission of the assessor, their agents, and employees in the execution of work. Further, the assessor shall be responsible for all employees while performing acts under the terms of this contract. Certificates of insurance by a company authorized to transact business in the State of Maine shall be supplied to the City, listing the City as an additional insured. Limits of Liability shall not be less than: a. Workers' compensation statutory limits b. Comprehensive general liability, including personal injury and blanket contractual liability c. Comprehensive auto liability, including property damage and non-ownership coverage.
8. The assessor shall instruct employees to maintain strict confidence regarding all privileged information received by reason of this contract.
9. The successful applicant must have thorough knowledge of the practices, procedures and legal guidelines of property assessment and taxation Per Maine Statute Title 36, knowledge of building construction and renovation practices, and of the procedures and records utilized in property ownership and transfer. All work of the assessor shall be accomplished in accordance with the provisions of the laws of the State of Maine and with all the rules and regulations officially adopted and promulgated by the Maine Revenue Service and the City.

## **GENERAL PROPOSAL REQUIREMENTS**

1. All proposals must identify the firm name, address, and specific assessment service experience in Maine. The proposals shall also include: the names, educational background, and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed. The assessor shall provide a detailed resume of the person assigned as the City's primary assessor/point of contact for the work to be performed. All personnel providing assessing services shall be currently certified in compliance with Maine Revenue Service and shall maintain certification throughout the duration of the assignment, and a valid driver's license.
2. The proposal shall include a listing of Maine municipalities with a population that is reasonably comparable to the City for which the firm currently provides assessment services. Please indicate whether the firm provides the municipality with general annual assessment services, revaluation services, or both.
3. The proposal shall include the total annual compensation rate to provide the assessment services described in the above and in accordance with the laws of the State of Maine for the 2022 assessment year.
4. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the RFP and is the most advantageous to the City considering experience, price, and other factors.

## **EVALUATION CRITERIA**

The following evaluation criteria will be used to review the Assessment Services Proposals that are received, and which meet the RFP specification requirements:

1. Selection of a qualified assessor will be based not only on the professional services offered, but on how customer service, communication and problem solving is delivered to City staff, elected City officials, taxpayers and stakeholders throughout the City.
2. Demonstration of successful experience in providing general assessment services and assessment software to Maine municipalities of similar size as the City.
3. Demonstration of customer service excellence and proactive approaches to issues.
4. Demonstration of positive experience with providing municipal assessment services.
5. Ability to provide and maintain a computerized database of property assessment records.
6. Demonstration of a high level of accuracy in assessment work for municipal clients.
7. Cost of Assessment Services.

## **DUE DATE OF PROPOSAL**

Proposals must be received in a sealed envelope marked, "Assessment Services" by February 7, 2022, at 4:30 PM and should be directed to:

City of Caribou  
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The proposals will be reviewed by staff who will present the proposals to the Board of Assessors. Finally, the Caribou City Council will review the recommendation at the February 14, 2022, City Council regular meeting.

By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the City is binding and without appeal. The City reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the City. In addition, the City reserves the right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty. The City reserves the right to accept the proposal considered most advantageous to the City, which, in its opinion, meets the specifications of the RFP regardless of whether the terms are the lowest cost. All respondents accept the preceding terms and procedures in submitting a proposal.