



REQUEST FOR PROPOSAL

VC-FIN-2024-01

Assessment Services

2025 to 2030

KEY PROPONENT INFORMATION

- **Issue Date:** Wednesday, February 7th, 2024
- **Closing Date for Submission:** Thursday, February 29th, 2024 at 1:00:00 pm MST.
One (1) electronic copy should be delivered to: finance@vulcancounty.ab.ca
- **Anticipated Contract Term:** The anticipated contract term is for a five (5) years term, starting March 1st, 2025, ending February 28th, 2030. The contract may include options for renewal for an additional three (3) years.
- **Vulcan County Contact Person / Project Manager:**

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1.0 Project Overview

1.1 Background

Vulcan County is a rural municipality situated in Southern Alberta, spanning approximately 545,000 hectares. It encompasses the Town of Vulcan, the Villages of Carmangay, Champion, Lomond, Milo, and Arrowwood, as well as the Hamlets of Brant, Ensign, Herronton, Kirkcaldy, Mossleigh, Queenstown, Shouldice, and Travers. As of the 2021 Municipal Census, the population of the County, excluding incorporated urban areas, stands at 4,237.

The primary industries in Vulcan County include agriculture, oil & gas, and renewable energy. The region boasts several recreation areas that attract both residents and tourists, with significant potential for development around three reservoirs. Notably, there is substantial wind and solar electrical generation located in the southern part of the County. Additionally, Vulcan County has recently established an industrial park adjacent to the Town of Vulcan, further enhancing its economic landscape.

The following information is drawn from Vulcan County’s 2023 Assessment Summary:

Assessment Class	Total Assessment (All)	# of Tax Roll Files	Total Assessment (Municipal)	# of Tax Roll Files	Total Assessment (Provincial)	# of Tax Roll Files
Residential	574,714,680	2,060	574,714,680	2,060	-	-
Commercial / Industrial	117,619,200	1,091	74,389,660	167	43,229,540	924
Farmland	205,106,450	9,181	205,106,450	9,181	-	-
Machinery and Equipment	78,620,730	432	16,961,360	17	61,659,370	415
Linear	634,671,090	109	-	-	634,671,090	109
Total Taxable & GIL	1,610,732,150	12,873	871,172,150	11,425	739,560,000	1,448
Exempt properties	231,757,770	2,017	231,757,770	2,017	-	-
Total	1,842,489,920	14,890	1,102,929,920	13,442	739,560,000	1,448

A 2023 Supplementary Assessment Roll was also prepared with the following:

Assessment Class	Total Assessment (All)	# of Tax Roll Files	Total Assessment (Municipal)	# of Tax Roll Files	Total Assessment (Provincial)	# of Tax Roll Files
Residential	2,424,800	20	2,424,800	20	-	-
Commercial / Industrial	210,720	2	-	-	210,720	2
Linear	380,889,120	5	-	-	380,889,120	5
Total Supplementary	383,524,640	27	2,424,800	20	381,099,840	7

**Note that supplementary assessment is not typical for the County; however, it is possible that during the proposed assessment contract period, the County may require one or more supplementary assessment rolls to be prepared during the term (determined on a year-to-year basis based on the major projects being commissioned during the year).*

The re-inspections of residential properties are completed on a 5-7 year rotating cycle, including the assessment of the hamlet properties within the County.

1.2 Project Objective(s)

Vulcan County (“County”) is seeking the services from an accredited assessment firm to complete all of the assessment services for the County (excluding linear assessment and designated industrial properties assessment).

The anticipated contract term is five (5) years with an option of renewal for three (3) additional years. The desired date for commencing work under the contract is March 1st, 2025, or earlier as may be agreed upon.

Vulcan County expects that the Proponent will provide all necessary assessment services as defined by Municipal Government Act, R.S.A. 2000, Chapter M-26, Section 284(1)(d); which defines the duties and responsibilities of the Assessor. The Contractor will also be responsible for meeting or exceeding the requirements of the Qualifications of Assessor Regulation, Alberta Regulation 233/2005, as amended.

The Assessor’s tasks involve annually preparing and certifying the values of all assessable properties within the municipality. This work must be done accurately, efficiently and in a manner and format that is easily defensible and understandable to the taxpayers. Municipalities and taxpayers expect unbiased valuations, which are both accurate and equitable.

2.0 Project Requirements

2.1 Scope/ Project Plan

Vulcan County is seeking to work in partnership with an accredited assessment firm to ensure all County properties are assessed on an annual basis in a timely, efficient, accurate, and courteous manner. The successful accredited assessment firm will have the following (but not limited to):

- Experience conducting assessments for rural municipalities similar in size and assessment base as Vulcan County
- Meet or exceed the quality standards set out in the Alberta Assessment Quality Minister’s Guidelines for assessments on all property types, including regulated properties.
- Provision of own transportation and equipment.
- Provision of assessment software to comply with all reporting for the Assessment Shared Services Environment (ASSET) system.
- Create assessments on all newly subdivided properties, including adjustments for road acquisitions (County & Alberta Transportation).
- Provide adjusted assessments for all removed or demolished improvements.
- Provide adjusted assessments relating to designated manufactured homes moved in and out of the municipality.
- Verify and document, annually, all sales information including interviews of property owners.
- Review non-profit organizations and advise Council and Administration of corresponding legislation changes.
- Ensure that all assessments have proper municipal tax codes.
- Respond to all inquiries from ratepayers relating to assessments.
- Adjust all unregulated properties to current market conditions to meet ASSET legislative requirements within the set time frame.
- Complete the annual submission to ASSET meeting the legislated requirements and timelines.

- Provide representative(s) to be present for the following:
 - After assessment notices are mailed out
 - Council meetings as required
 - Administrative meetings as required
- Written opinions of value on tax recovery properties and road allowance.
- Written opinions of value on municipal and/or school reserves.
- Engage in a re-inspection cycle, for residential land and improvements, visually inspecting all identified properties, checking for additions and deletions and verifying current assessment information which includes conducting an interior inspection and/or interviews with occupants when necessary.
- Engage in a re-inspection cycle for all non-residential properties each year; looking for signs of change including tenant/improvement changes, additions, deletions, and conduct interior inspections as required. In addition, annually requesting and reviewing all income information relating to income producing properties.
- Provide defense at local and composite assessment review board hearings.
- Utilize industry best practices and the latest technologies, whatever possible, for conducting/preparing the County’s assessment in an accurate, efficient, and cost-effective manner.
- All work completed on behalf of Vulcan County will be under the direction of a designated representative from the County office.

2.2 Milestones / Time Frames / Schedule

Anticipated Date / Timeframes	Event / Activities
February 29 th , 2024	RFP closing at 1:00:00 pm
March 13 th , 2024	Contract awarded by Vulcan County
March 1 st , 2025 Start <i>(year 1 – 2025/26)</i>	Anticipated start of contract
Annual / Ongoing	Adherence to Provincial year-end deadlines for assessment submissions.
February 28 th , 2029	Projected deadline for option of contract renewal (3-year term renewal)
February 28 th , 2030 <i>(year 5 – 2029/30)</i>	Anticipated completion of contract (unless renewal is applied)

3.0 Proposal Format and Response

The following format should be followed when preparing the proponents response.

- One (1) electronic copy to be delivered to finance@vulcancounty.ab.ca.
- Show the RFP name, submission closing date, Proponent name, address, telephone number, facsimile number, Email address, and the name of the Proponent contact person.

3.1 Key Proponent Information

Proposals for Assessment Services should include the following documentation:

Title Page

Show the RFP name, contract or file number, submission closing date, Proponent name, address, telephone number, facsimile number, Email address, and the name of the Proponent contact person.

Letter of Introduction

One page, introducing the firm and the proposal, signed by the person(s) authorized to sign on behalf of and bind the firm / proponent to statements made in the proposal. *Include confirmation of that Membership is in good standing with the Alberta Assessor's Association*

Executive Summary

Summarize in no more than two pages the key features of the proposal.

Methodology & Project Plan

Indicate your understanding of the key requirements of the project and the methodology you will use in undertaking the project. Be sure to address all of the requirements and specifications contained in the RFP, including:

- Scope of the project and client expectations / objectives.
- A description of the project structure / organization and methodology - including specific activities / tasks / resources / staffing.
- Include a set of facts and assumptions, rationale and decisions.
- Indicate timelines, milestones and products and services to be delivered.
- Include a re-inspection plan for residential properties.
- Project management, including problem identification and resolution.
- Resource management - inputs / resources to be provided by both client and contractor.
- Risk management strategy.
- Performance measurement, quality assurance and testing / certification criteria.
- Monitoring strategy.
- Reporting procedures including communication strategy / process.

Project Team Qualifications

Indicate the proponent's / project team's qualifications and capabilities for the project, including past projects having similar requirements to the one being proposed.

- Include resumes, summarizing the qualifications of the project manager / leader, project team members and subcontractors
- Specify how these staff will be organized and supervised on the project.

References

Provision of contact names and numbers for three (3) municipal references for which similar assessment services have been completed in the past.

3.2 Price Proposal

Price proposal for the Assessment Services shall be submitted on the attached “Price Schedule” (Section 7) and must be completed by:

- Shall be quoted on a year-by-year basis (March to February) for each general assessment year for the desired five (5) years in the proposed contract term and be based upon the initial (current) parcels of the County.
- Cost of preparing a Supplementary Assessment Roll (if required, which is at the sole discretion of the County).
- At the option of the proponent, they may include costs quoted on a year-by-year basis (March to February) for each general assessment year for the optional three (3) year renewal period. The option of renewal will be upon mutual agreement by both the County and the assessment firm (within one (1) year of the end of proposed 2025-2030 contract term – deadline for renewal is February 28th, 2029).
- Estimated expenses, whether included or excluded, should be provided and explained. All anticipated expenses that are not included in the annual general assessment costs, must be listed separately. The successful contractor must be prepared to lock-in these additional rates for the term of the proposed contract.
- The price proposal shall be made in accordance with the requirements of the RFP.
- The “Total Proposed Price” includes the Total Proposed Price of the 5-year term and may be factored by the proposed annual prices of the Supplemental Assessment. It does not specifically include the Total Proposed Price of the 3-year term renewal as this is optional and may or may not be completed by the proponent.
- Total upset figure. This figure shall not be exceeded without prior express written approval of Vulcan County. The total upset figure should not include a contingency allowance.

All proposals must be submitted with the following:

- The proposal must be signed by an authorized representative of the Proponent, and the official title of the Proponent, must be shown.

4.0 Evaluation Criteria

4.1 Mandatory Criteria

The first stage will consist of a review of all proposals to ensure that the appropriate number of copies (as noted in “Key Proponent Information”) of each proposal was received on time AND that the following mandatory requirements are met or exceeded:

- Membership in good standing in the Alberta Assessor’s Association.
- Qualifications of Assessor Regulation, as spelled out in Alberta Regulation 233/2005, as amended, are met or exceeded.
- Experience in performing rural and urban assessment in accordance with legislation.
- Experience preparing for and defending assessment complaints at the Local and Composite Assessment Review Boards levels.
- Evidence of insurance (as outlined below) and good standing with Worker’s Compensation Board (WCB), this must be provided as part of the submitted proposal.
- Maintaining strict adherence to provincial year-end deadlines for assessment submissions.
- Acknowledgement of and adherence to all Freedom of Information and Protection of Privacy (FOIP) requirements and regulations.

Proposals not considered compliant with the first stage maybe rejected;

4.2 Scored Selection Criteria

Provide the proponents with the selection criteria and their relative weightings / point allocations, with a scoring key equal to a total of 100 points.

Criteria	Points Weighing (%)
Comprehension/Methodology	15
Costs based on total proposed price submission	50
Project Team and Municipal Experience	15
Past Performance/References	15
Quality of Proposal	5

5.0 Terms and Conditions

5.1 Terminology

- “Must”, “mandatory”, or “required” means a specific criterion/criteria or requirement is/are essential to be met for the proposal to receive and continue to receive consideration. These criteria will be rated with a “yes”, having met the mandatory requirement, or “no”, not having met the mandatory requirement. Any mandatory criterion receiving a “no” response by the evaluation team will result in the proposal being rejected
- “Should” or “desirable means a requirement having a specific or significant degree of importance to meeting the RFP objectives. These criteria will be evaluated using a point scoring system.
- “Proponent”, means an individual or company that submits or intends to submit a proposal response to a Request for Proposal.

5.2 Proposal Conditions

Signed Proposals

The proposal must be signed by the person(s) authorized on behalf of the Proponent or Company and binds the Proponent to the statements made in the RFP response.

Irrevocability of Proposals

At the appointed closing time, all proposals become irrevocable. By submission of a proposal, the Proponent agrees that should its proposal be selected, the Proponent will enter into a contract with Vulcan County.

Changes to the Proposal Wording and Content

The Proponent will not change the wording or content of its proposal after closing and no words will be added to the proposal, including changing the intent or content of the presentation of the proposal, unless requested by Vulcan County.

Proponent Expenses

Proponents are solely responsible for their own expenses in preparing the proposal, presentations of their proposal, and travel costs incurred presenting and negotiating their proposal.

Proposal Pricing

Proposal prices must be firm for the term of the contract.

Acceptance of Proposals

This is a "Request for Proposals" and not an "Invitation to Tender". You are therefore advised that Vulcan County reserves the right to:

1. Accept a proposal without negotiations;
2. Reject a proposal without negotiations;
3. Negotiate changes in the technical or financial content of the successful proposal; and
4. Vulcan County reserves the right to accept or reject any and all RFPs and to waive irregularities and informalities at their own discretion. The County reserves the right to accept any RFP other than the lowest RFP without stating reasons. By the act of submitting its RFP, the Proponent waives any right to contest in any legal proceedings or action the right of the County to award the Work to any Proponent in its sole and unfettered discretion. Without limiting the generality of the foregoing, Vulcan County may consider any other factor besides price and capability to perform the Work that it deems in its sole discretion to be relevant to its decision including, but not limited to the following:
 - Experience
 - Reputation
 - Safety considerations including safety record
 - Financial solvency, or
 - Rating guide
5. Request clarification on a proposal at any time during the evaluation process.
6. Vulcan County reserves the right to negotiate with one or more bidders after receiving their proposals.

Negotiations

If a written contract cannot be negotiated within thirty (30) days of notification to the frontrunner or lead Proponent, Vulcan County may, at its discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a contract with the next qualified Proponent, or cancel the RFP process and does not enter into a contract with any firm.

Subcontracting

Proposed subcontractors must be listed with attached resumes. Joint proposal submission must indicate which Proponent has overall responsibility of the project.

5.3 Additional Terms and Conditions

Liability for Errors

The information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by Vulcan County, nor is it necessarily comprehensive.

Liability Cap

The Proponent, through the submission of a proposal, waives the right to any claim to lost profits or other additional compensation as a condition of submitting the bid. Damages shall be limited to throw away costs of preparing the bid, to a maximum of \$2,000.

Agreement with Terms

The Proponent, through the submission of a proposal, agrees to all terms and conditions of this RFP.

Modification of Terms / RFP Cancellation

Vulcan County reserves the right to modify the terms of the RFP prior to the proposal submission date at its sole discretion. Proponents will be advised of any changes or modifications in writing from Vulcan County. Vulcan County also reserves the right to cancel the RFP at any time prior to entering into a contract with the successful proponent.

Confidentiality of Information

Information pertaining to Vulcan County obtained by the Proponent as a result of participation in this project/contract is confidential and must not be disclosed without written permission from Vulcan County.

Ownership of the Proposals

All proposals, including attachments and any documentation, submitted to Vulcan County become the property of Vulcan County. Confidentiality of the contents of all proposals will be ensured by Vulcan County subject to the provisions of relevant Freedom of Information/Protection of Privacy legislation.

6.0 Specific Contract Clauses

Workers' Compensation Board (WCB)

The successful contractor and any subcontractor will need to be registered and in good standing with the Workers' Compensation Board (WCB). WCB coverage must be maintained for the duration of the contract.

Laws of the Province of Alberta

Any contract resulting from this RFP will be governed by and will be interpreted in accordance with the laws of the Province of Alberta

Indemnity and Hold Harmless

The Contractor shall indemnify and hold harmless Vulcan County and its employees and agents from any losses, claims, damages, actions, courses of action, costs and expenses that they may suffer, either before or after this Agreement expires or is terminated, by reason or any net of omission of the Contractor or of any agents, employees, officers, directors or subcontractors of the Contractor under this Agreement.

Insurance

Prior to the commencement of any contract arising out of this Request for Proposal, the Contractor shall, without limiting its obligations or liabilities, and at its own expense, provide and maintain throughout the term of the contract specific types of insurance with insurers licensed in the Province of Alberta, and shall provide the applicable Certificate of Insurance.

Payment Holdback

The contract may (or may not) contain a provision whereby Vulcan County will hold back a percentage of the contract value until the requirements of the contract, such as liability (third party) and performance (contract deliverables) have been achieved.

Intellectual Property

All data and information prepared, including attachments and any documentation, provided during the assessment services to Vulcan County become the property of Vulcan County.

7.0 Price Schedule

Assessment Services - Price Schedule

Proposed prices shall at a minimum meet the requirements outlined in the RFP:

Fiscal Year for Assessment Services	Proposed Price
March 1, 2025 to February 28, 2026	\$ _____
March 1, 2026 to February 28, 2027	\$ _____
March 1, 2027 to February 29, 2028	\$ _____
March 1, 2028 to February 28, 2029	\$ _____
March 1, 2029 to February 28, 2030	\$ _____
Total Proposed Price (5-year term)	\$ _____

Proposed price for preparing an annual supplementary assessment roll:

Supplementary Assessment Services	Proposed Price
Supplemental Assessment (1-year)	\$ _____

**Note that supplementary assessment is not typical for the County; however, it is possible that during the proposed assessment contract period, the County may require one or more supplementary assessment rolls to be prepared during the term (determined on a year-to-year basis based on the major projects being commissioned during the year).*

The following are OPTIONAL projected costs for an option of renewal.

Fiscal Year for Assessment Services	Renewal Price
March 1, 2030 to February 28, 2031	\$ _____
March 1, 2031 to February 29, 2032	\$ _____
March 1, 2032 to February 29, 2033	\$ _____
Total Proposed Price – Renewal (3-year term)	\$ _____

**The option of renewal will be upon mutual agreement by both the County and the assessment firm (within one (1) year of the end of proposed 2025-2030 contract term).*