



# CITY OF MUNISING, MICHIGAN

301 EAST SUPERIOR STREET • MUNISING, MICHIGAN 49862

CITY MANAGER  
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## Request for Proposals for Assessing Services

Issued: July 2<sup>nd</sup>, 2024

### Introduction

The City of Munising is a municipality who provides general municipal services within our corporate boundary. Assessing services for the City has been contracted with an individual for assessing services since 2006. Based on the proposals, it is possible that the City may enter a three-year contract with the candidate who is awarded a contract under this Request for Proposals. Specific information regarding tax tribunal cases is available upon request. The City of Munising is a full-service municipality that provides service to roughly 1,986 residents. The City is located on the South shore of Lake Superior and is approximately 5.2 Sq. Miles in size.

### 2024 Parcel and TV

Property Class	Parcel Count	TV
<b>Real Property</b>		
Commercial	195	\$ 23,308,890.00
Industrial	12	\$ 4,412,124.00
Residential	1092	\$ 49,047,827.00
<b>Total</b>	<b>1299</b>	<b>\$ 76,768,841.00</b>
<b>Personal Property</b>		
Commercial	151	\$ 1,083,100.00
Industrial	1	\$ -
Utility	4	\$ 3,747,800.00
<b>Total</b>	<b>156</b>	<b>\$ 4,830,900.00</b>
<b>Total Real &amp; PP</b>	<b>1455</b>	<b>\$ 81,599,741.00</b>

### Right of Refusal

The City of Munising reserves the right to accept or reject any or all proposals in whole or in part, and to waive any informality, irregularity or defect in this process or in any proposal should it be deemed in the best interest of the City.

### Specific Services Required

- Current certification to legally perform the duties of Assessor for the City of Munising
- Proficient in BS&A/Equalizer software
- Maintain local phone number, email address and required in person officer hours plus additional availability for meetings with residents, business owners, and other interested parties
- Provide for a minimum of 8 Hours of regularly scheduled in person office hours per month from October thru April and a minimum 12 hour of regularly scheduled in person office hours per month from May thru September.
- Respond promptly to inquiries from both City staff, residents, county equalization staff and other interested parties
- 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, City Charters, and City ordinances.
- Perform on-site inspections in compliance with Michigan law and to properly account for changes in property characteristics
- Maintain assessment rolls for the City, including ad valorem, specific tax rolls (IFTs, OPRA's, PILTs, TIFs, DDAs, etc.), and special assessments in order to ensure compliance with State law and the City Charters
- Keep the property record field cards up-to-date
- In consultation with City staff, perform land division and combinations as necessary, complying with the State's Land Division Act and County/City procedures for land divisions
- Prepare the winter and summer assessment rolls for the City Treasurer
- Analyze property sales of all property classes within the City to determine property values and appropriate assessment adjustments, including vacant land values
- Process all Principal Residence Exemptions (PREs), rescissions, Property Transfer Affidavits and transfer deeds.
- Process all poverty and veterans' exemption applications
- Verify millage rates for the City Staff and City Commission. Obtain millage rates from other taxing jurisdictions.
- 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 and present it to the City Commission at least annually.
- Prepare and present any proposed or revised assessing policies to the City Commission for review.
- Attend all Board of Review meetings for the City of Munising
- Complete Apex land and building footprint sketches for all real properties per state requirements
- Maintain accurate ownership and address information and process address change requests in a timely fashion
- Update City Treasurer and other administrative personnel with pertinent information on all name and address changes made to the database(s). All assessment files will be the property of the City and kept at City Hall.

- Track all Zoning permits and re-assess all properties with construction activity requiring a zoning permit to ensure that assessments are accurate
- Maintain parcel and tax maps and databases in a timely manner and provide them to the respective GIS contractor upon request.
- Process Personal Property Statements, including conducting an annual inspection to ensure an up-to-date list of personal property.
- Comply with all Personal Property Tax reporting requirements to the State of Michigan, tracking any required reductions.
- Upon request, meet with taxpayers regarding assessment determinations and to explain appeal procedures
- Respond to complaints pertaining to assessing property
- Act as the liaison in communicating with the public, media, and other governmental agencies on assessing issues
- Provide assessment information to the public similar to how the City currently provides this information on their websites. Send out printed assessment notices to all property owner in accordance with State laws.
- 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 attorney in the defense of appeals
- Prepare changes to the roll based on decisions of the Board of Review and/or Michigan Tax Tribunal
- Coordinate with Alger County Equalization Department office to facilitate the digital and manual transfer of data and values
- Communicate openly and in a timely fashion with City staff and the public in handling appeals to ensure the Board of Review has all available information to render their decisions.
- The Assessor is expected to present a positive professional image in both dress and conduct while interfacing with City staff and the public.
- Conduct themselves in a professional and positive manner when interacting with City Staff, Elected Employees, and all members of the public.
- Update market values for land and buildings owned by the City. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
- Perform all other duties incidental to the normal duties of an Assessor
- Make timely taxable value estimates. Timing of the taxable value estimates will need to be negotiated with the City.
- Assist with the AMAR and advise the municipality of standards and recommended actions to ensure full compliance with the State Tax Commission
- Conduct all action in accordance with the Supervising Preparation of the Assessment Roll and any other guidance, statute, or best practice as now or in the future may be created

### **City Clerical/Administrative Assistance Services Offered**

The City of Munising will provide limited clerical services to assist the Assessor(s). The limited support will include answering routine telephone calls and walk-in requests for assessment

data, provide the Assessor's telephone number to residents as necessary, provide copies of all assessment open records as requested and assist in mailing notices. The City will be responsible for the cost of printing assessment notices, tax bills, and postage. The City will continue to schedule the Board of Review meetings at City Halls and post the public notices. The City will provide office space to including a desk, chair, filing cabinets, City email account, and desktop computer with access to the relevant City of Munising BS&A Modules and APEX software.

### **Proposal Requirements**

The selection process will be focused upon quality-based selection criteria. Those interested in submitting sealed proposals must submit six copies. The proposals shall include a list of current clients and projects along with a list of references (minimum of three). The respondent should provide:

1. Name, address, telephone number, and email address of the individual/firm.
2. Name, email and telephone number of contact responsible for services if different than Number 1.
3. Number of years the individual/firm has been in business.
4. Statement of Qualifications.
5. Brief history of the Company and specialty areas.
6. Experience of the Company in contracting with municipalities.
7. Municipalities currently contracted.
8. Municipalities contracted in the past.
9. If proposer is a firm, identify staff who will be assigned to City matters, including resume, title, specialty, experience and expected role.
10. Board of Review and/or Michigan Tax Tribunal experience
11. Minimum of three (3) references, including contact information.
12. Copies insurance certificates with the following minimums:

#### Commercial General Liability (CGL)

Proposer shall maintain CGL with a limit of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate

CGL insurance shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract, including this contract.

#### Workers Compensation (WC)

If the proposer is a firm, Proposer shall maintain a WC policy with a minimum of \$500,000 for bodily injury.

13. Copy of current MCAO certification and any other relevant certifications
14. Any additional data the proposer feels may be helpful in the selection process.
15. Total annual compensation rate to provide assessment services in the above specific required services for fiscal years:
  - 2024-25
  - 2025-26
  - 2026-27

Bidders shall express their fees for each year of the three-year contract in a not-to-exceed sum to include all of the Assessor's costs, including but not limited to: labor, materials, transportation costs, meals, lodging, Board of Review, Small Claims divisions of the Michigan Tax Tribunal and the full Michigan Tax Tribunal expenses. All incidental expenses will be the responsibility of

the Assessor(s) or Assessing firm. The payments shall be made in twelve (12) equal installments made monthly with the start date to be determined at the execution of a contract.

### **Other information**

The successful Assessor(s) or Assessing Firm will be selected and hired at the sole discretion of the City Commission. The Request for Proposals will serve as the basis of the initial services contract with the Assessor or Assessing Firm.

The City Commission will evaluate all qualifying submitted proposals and will make an award at their discretion. This award will be contingent on the execution of a contract in which the RFP and proposal documents will be incorporated into via reference.

### **Evaluation Criteria**

The following evaluation criteria will be used to review the Assessing Services proposals that are received and which meet the general quotation requirements.

1. Demonstration of successful experience in providing general assessment services to municipalities of a similar size
2. Past experience with providing assessment and revaluation services. Demonstration of a high level of accuracy in assessment work for municipal clients
3. Reference Responses
4. Quality of Individual (or staff) provided within the proposal
5. Cost of assessment services

### **Deadline**

Six copies of the Proposal shall be delivered in a sealed package to Devin Olson, City Manager, at the address below. Packages should be clearly marked "City Assessor RFP." Proposals are due and at 12:00 PM EST on Thursday, August 1<sup>st</sup>, 2024. Proposals received after this time will not be considered.

City of Munising  
301 E. Superior St.  
Munising, MI 49862

Questions and/or clarification can be directed to the Munising City Manager at (906) 387-2095 or [CityManager@CityofMunising.org](mailto:CityManager@CityofMunising.org)