



REQUEST FOR PROPOSAL

Designated Industrial Properties Assessment Services

Issue Date: June 1, 2018
Closing Date: July 3, 2018 2:00 pm MST

Clearwater County
Box 550
4340 – 47 Avenue
Rocky Mountain House, AB T4T 1A4

Attention: Murray Hagan
Director, Corporate Services
mhagan@clearwatercounty.ca



TABLE OF CONTENTS

1.0 Introduction	
1.1 RFP Introduction	Page 3
1.2 RFP Schedule of Events	Page 3
2.0 Engagement Overview	
2.1 Requirements	Page 3
2.2 Timelines	Page 4
2.3 Term	Page 4
2.4 Agreement	Page 4
3.0 Overview of Organization	
3.1 Clearwater County	Page 4
3.2 Selected Assessment Information – 2017	Page 4
4.0 Response Guidelines	
4.1 Submissions Requirements	Page 6
4.2 Presentation	Page 7
4.3 RFP Evaluation Criteria	Page 7
5.0 RFP Conditions	
5.1 Confidentiality	Page 7
5.2 Acceptance, Rejection, or Re-issue of RFP	Page 8
5.3 Incurred Costs and/or Compensation	Page 8
6.0 Contact Information	
6.1 RFP Contact	Page 8
6.2 Clearwater County	Page 8



1.0 Introduction

1.1 RFP Introduction

Clearwater County (the “County”) invites proposals from qualified assessment firms for the provision of professional assessment services related to Designated Industrial Properties (DI properties), excluding linear properties, within the County for assessment years 2018 through 2020.

1.2 RFP Schedule of Events

RFP issue date	June 1, 2018
RFP closing date	July 3, 2018
Shortlist announced	July 20, 2018
Shortlist presentations	July 30, 2018
Selection of preferred vendor:	August 3, 2018

The dates above are provided for information purposes only and may be subject to change. Please note, only those shortlisted for presentations will be contacted.

2.0 Engagement Overview

2.1 Requirements

The preferred vendor will be responsible for the following:

- Preparation of assessments for DI properties in accordance with the *Municipal Government Act* and related regulations.
- Adherence to any other applicable policies or guidelines as issued from time to time by Alberta Municipal Affairs or the County.
- Provision of assessment information as requested by the County for the Minister of Municipal Affairs or Provincial Assessor in compliance with the statutory reporting requirements prescribed in the *Municipal Government Act* and related regulations.
- Provision of completed assessments to the appointed Municipal Assessor for submission to the Provincial Assessor in compliance with the statutory timelines prescribed in the *Municipal Government Act* and related regulations.
- Provision of appropriate software and all necessary hardware required to provide DI property assessment services.



2.1 Requirements (Cont.)

- Provision of digital photographs and any other relevant documentation to support assessment values.
- Assistance and support to the County in responding to assessment queries and complaints including representation at appeal hearings if requested to do so.

2.2 Timelines

<u>Service/Deliverable</u>	<u>Due Date</u>
Annual DI property assessments	November 30 annually
Amended assessments	As completed
Inspections of existing DI properties	As completed
Inspections of all new or upgraded DI properties	November 30 annually
Inspections of Major Plants	As completed

2.3 Term

The service period is for a three-year term beginning with assessment year 2018 and ending December 31, 2020. Two optional one-year extensions are available as mutually agreed between the County and the preferred vendor.

2.4 Agreement

A letter of engagement setting out the assessment requirements based on this RFP and the proposal will be developed and signed by the County and the preferred vendor.

3.0 Overview of Organization

3.1 Clearwater County

Clearwater County is a large rural municipality located in west central Alberta endowed with unparalleled natural beauty, industrial resources and opportunity. Agriculture, oil and gas, forestry and tourism are principle economic generators. Prime agricultural lands are located in the eastern sectors of the municipality, while the much larger western portions are mostly forested and mountainous.

The Town of Rocky Mountain House and the Village of Caroline are the urban centres servicing well-developed health, school, cultural and recreation facilities. The Hamlets of



Leslieville, Withrow, Condor, Alhambra and Nordegg, as well as numerous country residential subdivisions, provide opportunities for a variety of lifestyles and host a range of cultural, commercial and municipal emergency services.

Clearwater County supports a variety of recreation and culture opportunities that promote healthy lifestyles; build a sense of community; and preserve history.

Geographical

Clearwater County is 7,217.41 sq mile or 18,691.65 sq. kilometers

Topographical

The topography of the County can be described as Boreal Forest with the eastern section going to Parkland and western section to mountainous terrain, dispersed with numerous creeks, rivers and lakes with associated wetland areas.

Winter climate can vary from extreme cold to chinooks, with average seasonal temperatures of -20 °C. Summer brings an average temperature of 20° C. Spring and fall bring a variety of weather conditions, ranging from snow flurries to above average seasonal highs.

Demographics

Population:

2001 - 11,505

2006 - 11,826

2011 - 12,278

2016 - 11,947.

3.2 Selected Assessment Information – 2017

- | | |
|---|-------|
| ▪ DI Property Roll Count (excluding major plants) | 6,975 |
| ▪ Major plants | 4 |

4.0 Response Guidelines

All submissions become the property of Clearwater County and will not be returned to the sender. RFP responses are to be e-mailed, in PDF, to Murray Hagan, Director, Corporate Services, at mhagan@county.clearwater.ab.ca or delivered in a sealed envelope to the County office at the following address:

4340-47 Avenue
Rocky Mountain House, Alberta

Submissions must be received 2:00 PM, MST, July 3, 2018.



4.1 Submission Requirements

All submissions should contain the following information:

- The name of the firm, telephone number and name of contact person.
- The proposed assessment team, including qualifications and identification of previous related assessment experience for each person.
- A listing of current and past DI property assessment engagements undertaken by the firm and the number of years of service to each client.
- Contact information for references at two municipalities for whom the respondent has provided assessment services that are similar in scope and complexity to the services described in this RFP. The County may contact these references without prior notification to the respondent.
- An outline of how the assessor proposes to meet the engagement requirements and timelines identified, including details of assessment methodology and suggested dates when work will be performed.
- Cost of services, including:
 - Cost to determine assessed value per DI property excluding machinery & equipment and major plants
 - Cost to determine assessed value per DI property including machinery & equipment but excluding major plants
 - Cost to determine assessed value per major plant
 - Identification of any additional charges and the basis for calculation of those costs
- Identification of any potential conflict of interest or circumstances that could be perceived to be a conflict of interest should the respondent be selected as the preferred vendor.
- Confirmation that the respondent carries all required professional liability insurance and workers compensation coverage.



4.2 Presentation

Only those respondents chosen for a short list will be invited to make a presentation.

All Presentations are to be delivered, in person, at the Clearwater County office and should not exceed one hour in length. Additional time will be available for discussion following the presentation.

No software applications are to be installed on County systems and any presentation data will need to be submitted to the County at least 24 hours before the presentation to allow for preparation.

4.3 RFP Evaluation Criteria

Each submission will be measured against the following criteria:

- Quality and clarity of the submission.
- Respondent's demonstrated ability to meet the requirements of the engagement.
- Clearly explained and cohesive work plan.
- Appropriateness of methodology and approach proposed.
- Total maximum cost for the three year engagement period.
- Presentation.
- References

5.0 RFP Conditions

5.1 Confidentiality

Respondents at all times will consider all information and data received from Clearwater County to be confidential. In addition, the proponents shall not use or disclose any information to anyone without written consent of approval from authorized individuals of Clearwater County, except for necessary preparation of the RFP and, if selected, for the completion of the work.

All documents submitted to Clearwater County will be subject to the protection and disclosure requirements of the Freedom of Information and Protection of Privacy legislation (FOIP).



5.2 Acceptance, Rejection or Re-issue of RFP

Clearwater County is not under any obligation to select a vendor, nor is it required to accept the lowest cost proposal. Clearwater County reserves the right to accept, or refuse an RFP. Clearwater County reserves the right to discuss different or additional terms to those included in the RFP. Clearwater County reserves the right to amend or modify any term in this RFP. By the act of submitting its RFP, the bidder waives any right to contest in any legal proceeding or action the right of the County to award the work to whomever it chooses, in its sole and unfettered discretion.

5.3 Incurred Costs and/or Compensation

No respondent shall have any claim for compensation of any kind as a result of participating in the RFP; by submitting a proposal each respondent shall be deemed to have agreed that it has no claim. Preparing and presenting the proposal is the sole financial responsibility of the respondent and costs will not be compensated.

6.0 Contact Information

6.1 RFP Contact

Murray Hagan
Director, Corporate Services
Phone: 403.845.4444
E-mail: mhagan@clearwatercounty.ca

6.2 Clearwater County

Street Address:
4340 - 47 Avenue
Rocky Mountain House, AB

Mailing address:
Box 550
Rocky Mountain House, AB
T4T 1A4

Office: 403.845.4444 | Fax: 403.845.7330 | www.clearwatercounty.ca