



# REQUEST FOR PROPOSAL

## Addendum #1

### Questions and Answers

Issue Date: June 20, 2018

Designated Industrial Properties Assessment Services

Issue Date: June 1, 2018

**Closing Date: July 3, 2018 2:00 pm MST**

Clearwater County  
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1) Q: The RFP mentions 4 major plants, could we obtain the industrial assessment details for these?

A: In the interest of confidentiality, we will not be releasing these details. Please also note that the number of major plants has been updated to 5 within the RFP to correspond to the final listing maintained by Alberta Municipal Affairs.

2) Q: The RFP mentions 6,975 DIP properties, could we obtain the industrial recap by owner report for these?

A: We won't be providing this level of detail. However, we can supply the following total assessment values:

M & E	\$1,670,209,180
B & S	\$326,733,940
M & S	\$2,484,500
<u>Land</u>	<u>\$209,702,620</u>
Total	\$2,209,130,240

3) Q: Who is your current appointed assessor

A: The County has recently filled the position of Manager, Assessment. This person will be appointed Municipal Assessor in the near future.

4) Q: There is no legislated requirement on conducting yearly inspections of DIP properties, the RFP doesn't set-out what would be expected as well, can you tell me if this is the case (yearly inspections of all properties) or will you be going by what is recommended by potential vendors?

A: Our intention is to follow the recommended 20% reinspection cycle, along with ongoing inspections of new accounts as determined by the municipality.



5) Q: Who has been preparing your DIP properties in the past couple of years

A: In recent years, this has been accomplished through a combination of contracted services and in-house assessment staff.

6) Q: I assume inputting of yearly changes will be our responsibility, a working space would be provided by the County for this purpose?

A: Yes, updated assessment information will be entered by the preferred vendor. The preferred vendor will be expected to provide all required resources, including office space. If this is required, it should be identified within the proposal.

7) Q: On page 6 one clause reads:

*“Cost to determine assessed value per DI property excluding machinery and equipment and major plants”*

*“Cost to determine assessed value per DI property including machinery & equipment but excluding major plants”*

These two clauses seem to contradict each other so just wondering if you could explain exactly what is required.

A: The first clause refers to DI properties that don't involve M & E while the second refers to those properties that do involve M & E. This is to allow for differences in pricing considering the additional work involved with M & E.

8) Q: Any outstanding 2017 Assessment / 2018 Tax Year (Major Facilities, Costing Renditions, etc.)

A: No.

9) Q: Have any requests for facility capital cost information been sent in 2018?

A: No.



10) Q: Who will be responsible for sending and reviewing the annual Request for Information (RFI's), the County or the Contractor?

A: The County will send the RFI's and make copies available to the preferred vendor.

11) Q: Have historical renditions and company reporting been scanned and attached in CAMA lot? If not are they available?

A: Yes to both questions.

12) Q: Can we obtain the # of new Industrial accounts created over the past 5 Yrs?

A: Not available.

13) Q: Can we obtain the # of Industrial Permit Notifications over Past 5 Years. Is there a current listing that is maintained?

A: Not available.

14) Q: It is our understanding that Clearwater County assesses Land at Wellsite's. Has this been completed on all DI properties? Will the contractor be responsible for adding Land at Wellsite's, or simply communicating back new and/or cancelled locations.

A: Correct, land at wellsites is included. We are currently reviewing information on file for completeness. The preferred vendor will be expected to inform the County of new and/or cancelled locations.

15) Q: Access to CAMA lot will be via a RDP Connection or a VPN w/ ability for Offsite CAMA lot capabilities?

A: It is anticipated that remote access to the system will be available. The connection method has not yet been determined.



16) Q: Can an Industrial Recap by Owner Report be obtained in a .pdf and .xlsx format?

A: See Question 2.

17) Q: Can a Municipal Assessment Summary be obtained?

A: Not available.

18) Q: Section 2.2 lists a Due Date for Annual DI property assessments as November 30<sup>th</sup> annually. Should this date actually be January 15<sup>th</sup> annually as communicated by the Provincial Assessor?

A: We've identified November 30<sup>th</sup> to allow time for review and potential questions by the Municipal Assessor prior to the provincial deadline.

19) Q: Have any physical field inspections been completed for the 2018 Assessment?

A: No.

20) Q: Please confirm that the intended Re-Inspection Cycle is 20% annually. What have been the Re-Inspections areas over the past 5 years (TWP / Ranges?)

A: See Question 4. Past re-inspections have been based on ranges.

21) Q: Are there any known Major Facilities or Expansions for the 2018 Assessment.

A: We are aware of some degree of change (increases and/or decreases) to existing major plants. No new plants have been confirmed.

22) Q: From the RFP, the # of DI Properties (Excluding Major Plants) = 6,975 Does this include DIP parcels that have Land only? Is this 6,975 accounts with B&S or M&E?

A: This will include parcels that have land only and represents properties with a mix of B&S and/or M&E.



23) Q: The RFP states 4 Major Plants, Ministers Guidelines lists 5. Please clarify? (See attached list of Major Plants, Page 93 of the 2017 Alberta Machinery and Equipment Ministers Guidelines)

A: See Question 1.

24) Q: What is the inspection cycle?

A: See Question 4.

25) Q: Timelines - We noticed that November 30th is the Due Date for Annual DIP assessments. However the inspections are to be done "as completed." Is that different than the Nov 30th Due Date?

A: November 30<sup>th</sup> is the date we've set to have all inspections done for the year (re-inspections and additions).

26) Q: Amended Assessments are as completed but does this only refer to amendments prior to November 30th, or can these run later in the year?

A: This will need to be confirmed with the Provincial Assessor.

27) Q: Previously the municipality prepared the RFI's and they are not identified in the RFP, therefore will this function remain with the municipality? We are unclear if the resulting renditions will also be part of the annual work to be completed or not? (previously this function was maintained by the municipality)

A: See Question 10 re: RFI's. Resulting renditions will be the responsibility of the preferred vendor to enter.

28) Q: Is there an estimate for new accounts that can be used in preparing our response to the RFP?

A: We do not have an estimate available. We recognize that new accounts will affect workload for the preferred vendor, but we don't expect it to affect pricing given that pricing is to be provided on a per property basis.



29) Q: Cost of services, including:

- a. We need guidance on what does the first bullet mean regarding "cost to determine assessed value per DI property excluding M&E and major plants". Are you referring to the buildings & structures or just the office work?
- b. Bullet "cost to determine assessed value per DI property including M&E but excluding major facilities", is this asking for the cost per account but not including the valuation of the building and structures?
- c. Additional charges: Is this an identification of separate costs that will be incurred for new sites, and the possibility of appeals or is there something else?

A: See Question 7 re: items a) and b). With respect to additional charges, we expect the costs related to new sites will be included in the price per property quote. Appeals, or any other time not identified elsewhere in the proposal should be included here.