



Michael V. O'Brien  
City Manager

CITY OF WORCESTER

cm2011jun13162926

Attachment for Item #

9.30 A

August 9, 2011

TO THE WORCESTER CITY COUNCIL

COUNCILORS:

A triennial revaluation is required by each and every city and town in Massachusetts every three years. As part of the triennial revaluation, municipalities are responsible for developing a reasonable and realistic program to achieve the fair cash valuation of property in accordance with law. This program includes, but is not limited to, a review and analysis of existing property values and verification of existing property record information. All properties are revalued in accordance with law and DOR guidelines.

The City was scheduled for a revaluation in Fiscal Year 2011. In light of limited resources within the Division and a complex data conversion initiative, the City was unable to meet the timelines necessary to complete the FY2011 revaluation. A provision of recently enacted State law (Municipal Relief Act) allowed for communities to seek a one-year extension for revaluation. The City pursued and received approval of an extension from DOR to provide for the additional time to finalize the conversion and thoroughly review and revalue the City's 48,000 real estate parcels and existing property records. We are now in the midst of a FY2012 revaluation process. This communication is meant to provide you with an update on progress and our efforts to ensure fair and equitable taxation.

### **REAL ESTATE PROPERTY REVALUATION PROCESS**

The DOR has been providing oversight and high levels of guidance to the Assessor's Division to prepare for the revaluation. The Deputy Commissioner and Bureau Chief meet monthly with Chief Financial Officer Thomas Zidelis and me. This direct line of communication has been extremely helpful and will keep this multi-faceted, complex effort on task and on timeline. Additionally, recognizing the limited resources within the Division, the DOR strongly recommended that we hire a contracted project manager to assist the Assessor to address all the various tasks associated with this revaluation. In addition to engaging a project manager, the City has also contracted with an independent company to conduct a data quality and reliability study. This study will include verification of property data from the property records with independent, on-site field reviews. Approximately 2.5% of every class of property will be data quality checked in the field by these independent consultants, with results reported to the DOR and the City, to ensure the accuracy of the data. DOR guidelines require between 1 and 5% of every class of property be reviewed. It is important to note that this entire process is formalized in a written manual for all staff and all consultants to ensure a consistent method in data gathering, collection and storage. The manual will be posted



OFFICE OF THE CITY MANAGER, CITY HALL, WORCESTER, MA 01608  
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online this year in a simple and easy-to-read format for residents and property owners to access.

As you know, in 2007, we began the conversion of our dated software (some of which dates back to 1970s DOS-based programming) to a new mass appraisal computer program (Vision) that provides the most reliable inventory, imaging and verification of property data available. This effort was a recommendation by DOR during our last revaluation. This method of property review and inspection is accomplished through the use of technology in which photographs of all 48,000 real estate parcels, taken between the period of June 15 and July 1, 2010, are uploaded to a computer system that generates a clear, three-sided image of these parcels, allowing the Assessor's Office and independent appraisers to gather information about a property's style, grade of construction and condition of property from a computer station. Previously, an assessor would need to drive by all 48,000 properties to "window-survey" and assess these properties. The new method is far more efficient and less costly for the same views and the data can be ascertained from an office setting. Using the new technology, an assessor can perform an average of 60 assessments a day, versus an average of 25 assessments a day with the "window-survey" method. It is also important to note that our new online ViewPermit software will be linked to the computer (Vision) system to capture all property improvements or upgrades, once again ensuring that the data is accurate.

To date, the Assessor's Division, with assistance of contracted appraisers, has completed virtual property reviews using the new (Vision) computer program on 100% of the City's commercial properties and 95% of residential properties. I've attached an example for your information of the new property records, which are representative of what will be produced for each property from the new mass appraisal system.

### **PERSONAL PROPERTY REVALUATION**

Additionally, all personal property accounts are being reviewed as part of the revaluation. Each year, prior to March 1, all commercial entities subject to taxation in a city or town must submit a list of all their personal property that is not exempt from taxation by completing a Form of List (FOL). The City has contracted with an independent firm that specializes in assessment of personal property to affix values to the approximate 1,200 business entities that have filed their FOL. For those businesses that have not filed their FOL, the Assessor will affix a value based on estimates of personal property from similar type and size businesses. This standardized method the data will ensure that each account is assessed equitably to similar accounts and that values are consistently applied.

### **FINAL CORRELATION**

The final step in the appraisal process is to analyze the value indications from the cost, market, and income approaches and determine a single market value determination for the parcel of property. Given the time to conduct the virtual and field reviews, this portion of the process will be contracted to firms that are well-versed and well-respected in the field of assessments. Once this is complete, the DOR will conduct one last field review, which is scheduled to take approximately one month, to check the data and verify its accuracy. If these valuations meet the DOR standards for recertification, and we are subsequently certified, the City will embark on a public disclosure period.

## **PUBLIC DISCLOSURE PROCESS**

As part of this process, property owners will receive a copy of their property records via mail (sample attached), which they can review. In addition, property record cards will be posted on the City's Web site at [www.worcesterma.gov](http://www.worcesterma.gov). This information will be real-time data extracted from the new computer system. Property owners will be able to query the system and access any of the 48,000 property records.

In addition, property owners will be notified of public sessions set around the City in which taxpayers can ask questions about their property valuations. There will be a special phone line dedicated for taking questions and tracking calls, and Frequently Asked Questions (FAQ) will be posted on the Web site.

The City will also extend hours of operations at the Assessor's Division to accommodate taxpayers and answer any questions relative to property values. This will include nights and weekends. All of this information will be communicated through various media outlets, including Channel 12, ads, mailings, etc.

We will also provide information on the City Council tax classification process, the tax abatement process, and the Appellate Tax Board.

## **CITY COUNCIL ACTIONS**

Once the public disclosure process is complete, my Administration will bring forward a completed tax classification package for City Council review and final approval. This is expected by late November/ early December. I will continue to keep you apprised as we move forward.

Respectfully submitted,



Michael V. O'Brien  
City Manager

CURRENT OWNER		TOPO.	UTILITIES	STRT./ROAD	LOCATION	CURRENT ASSESSMENT			
121 LINCOLN MEDICAL LLC					P Paved Street	Description	Code	Appraised Value	Assessed Value
0325 SALISURY ST						COMMERC.	3420	612,000	612,000
WORCESTER, MA 01609						COM LAND	3420	310,900	310,900
Additional Owners:									
SUPPLEMENTAL DATA									
Other ID:		0100900010							
GIS ID: 01-009-00010		ASSOC PID#							
Total								922,900	922,900

360  
WORCESTER, MA

**VISION**

RECORD OF OWNERSHIP		BK-VOL/PAGE	SALE DATE	q/u	v/i	SALE PRICE	V.C.	PREVIOUS ASSESSMENTS (HISTORY)														
121 LINCOLN MEDICAL LLC		42099/ 237	11/21/2007	U	I	1,300,000	1N	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value						
121 LINCOLN REALTY TRUST		04944/ 412	01/01/1988	U	I			2010	3420	355,300	2009	3420	582,700	2008	3420	349,000						
								2010	3420	549,800	2009	3420	335,400	2008	3420	330,600						
Total:								905,100			Total:			918,100			Total:			679,600		

EXEMPTIONS				OTHER ASSESSMENTS				
Year	Type	Description	Amount	Code	Description	Number	Amount	Comm. Int.
Total:								

This signature acknowledges a visit by a Data Collector or Assessor

ASSESSING NEIGHBORHOOD				
NBHD/ SUB	NBHD Name	Street Index Name	Tracing	Batch
2/A		30		

APPRAISED VALUE SUMMARY	
Appraised Bldg. Value (Card)	596,100
Appraised XF (B) Value (Bldg)	4,400
Appraised OB (L) Value (Bldg)	0
Appraised Land Value (Bldg)	310,900
Special Land Value	0
Total Appraised Parcel Value	922,900
Valuation Method:	I
Adjustment:	0
<b>Net Total Appraised Parcel Value</b>	<b>922,900</b>

NOTES									
2007 SALE GRANTEE PURCHASED FOR SPECULATIVE PURPOSES									
ADJ LAND AREA FROM 56888 TO 28444 SF									

BUILDING PERMIT RECORD								
Permit ID	Issue Date	Type	Description	Amount	Insp. Date	% Comp.	Date Comp.	Comments

VISIT/ CHANGE HISTORY					
Date	Type	IS	ID	Cd.	Purpose/Result
06/25/2010	E		DA	BP	Building Permit

LAND LINE VALUATION SECTION																			
B #	Use Code	Use Description	Zone	D	Front	Depth	Units	SF	Unit Price	I. Factor	S.A.	C. Factor	ST. Idx	Adj.	Notes- Adj	Special Pricing	S Adj Fact	Adj. Unit Price	Land Value
1	3420	PROF BLDG MDL-94	BO-1				10,000	SF	10.00	1.0000	5	1.00	2	1.20			.00		120,000
1	3420	PROF BLDG MDL-94	BO-1				18,444	SF	8.63	1.0000	5	1.00	2	1.20			.00		190,900

CONSTRUCTION DETAIL				CONSTRUCTION DETAIL (CONTINUED)			
Element	Cd.	Ch.	Description	Element	Cd.	Ch.	Description
Style	OMD		Medical Office				
Model	94		Commercial				
Grade	C		AVE MASONRY				
Stories	2						
Occupancy							
Exterior Wall 1	SC		Stucco				
Exterior Wall 2	SC		Stucco				
Roof Structure	04		Wood Truss				
Roof Cover	03		Asph/Fbgl/Comp				
Interior Wall 1	03		Plaster				
Interior Wall 2	05		Drywall/Shtrk				
Interior Floor 1	14		Ww/Carpet				
Interior Floor 2	05		Vinyl/Asphalt				
Ext. Qual.	A						
Int. Qual.	A						
Bldg Use	3420		PROF BLDG MDL-94				
Elevator	0						
Sprinkler	0						
Heat/AC	13						
Frame Type	03		Masonry				
Baths/Plumbing	02						
Ceiling/Wall							
Rooms/Prtns							
Wall Height	12						
% Comn Wall							
				Adj. Base Rate:			106.35
				Replace Cost			1,324,589
				AYB			1960
				Dep Code			A
				Remodel Rating			
				Year Remodeled			
				Dep %			40
				Functional Obslnc			15
				External Obslnc			0
				Cost Trend Factor			
				Condition			
				% Complete			
				Overall % Cond			45
				Apprais Val			596,100
				Dep % Ovr			0
				Dep Ovr Comment			
				Misc Imp Ovr			0
				Misc Imp Ovr Comment			
				Cost to Cure Ovr			0
				Cost to Cure Ovr Comment			

**OB-OUTBUILDING & YARD ITEMS(L) / XF-BUILDING EXTRA FEATURES(B)**

Code	Description	Sub	Sub Descript	L/B	Units	Unit Price	Yr	Gde	Dp Rt	Cnd	%Cnd	Apr Value
PVAS	Asphalt Paving			B	14,000	1.00	1970	F	2		100	4,400

**BUILDING SUB-AREA SUMMARY SECTION**

Code	Description	Living Area	Gross Area	Eff. Area	Unit Cost	Undeprec. Value
EPH	Enclosed Porch	0	135	81	63.81	8,614
FUS	Upper Story, Finished	1,702	1,702	1,702	106.35	181,008
GLA	Gross Leasable Area	5,336	5,336	5,336	106.35	567,484
GLU	GLA - Upper Story	5,336	5,336	5,336	106.35	567,484
<b>Ttl. Gross Liv/Lease Area:</b>		<b>12,374</b>	<b>12,509</b>	<b>12,455</b>		<b>1,324,589</b>

GLA(12374)		EPH	
		15	9
FUS	GLA		
	GLU		
		46	46
37			116
LINCOLN ST			



CURRENT OWNER		TOPO.	UTILITIES	STRT./ROAD	LOCATION	CURRENT ASSESSMENT			
9 FORESTDALE LLC		U High	A All Utilities	P Paved Drive	P Paved Street	Description	Code	Appraised Value	Assessed Value
0001 KELLEY SQ STE 302			P Sewer		C Corner	RESIDENTL	1040	156,800	156,800
WORCESTER, MA 01610						RES LAND	1040	54,800	54,800
Additional Owners:									
SUPPLEMENTAL DATA									
Other ID:		01-009-00001/01							
GIS ID: 01-009-00001		ASSOC PID#							
						Total		211,600	211,600

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WORCESTER, MA

**VISION**

RECORD OF OWNERSHIP		BK-VOL/PAGE	SALE DATE	q/u	v/i	SALE PRICE	V.C.	PREVIOUS ASSESSMENTS (HISTORY)								
9 FORESTDALE LLC		42311/ 149	01/16/2008	U	I	195,000	1F 1H	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value
NAJEM,CHRISTINE		40640/ 79	11/16/2007	U	I			2010	1040	174,800	2009	1040	173,700	2008	1040	198,400
GRBOUSKI,VINTON M + PATRICIA		4755/ 71	01/01/1988	U	I			2010	1040	54,500	2009	1040	67,700	2008	1040	43,200
						Total:		229,300	Total:		241,400	Total:		241,600		

EXEMPTIONS				OTHER ASSESSMENTS			
Year	Type	Description	Amount	Code	Description	Number	Amount
Total:							

This signature acknowledges a visit by a Data Collector or Assessor

ASSESSING NEIGHBORHOOD				
NBHD/ SUB	NBHD Name	Street Index Name	Tracing	Batch
20/A		2003		

APPRAISED VALUE SUMMARY	
Appraised Bldg. Value (Card)	156,800
Appraised XF (B) Value (Bldg)	0
Appraised OB (L) Value (Bldg)	0
Appraised Land Value (Bldg)	54,800
Special Land Value	0
Total Appraised Parcel Value	211,600
Valuation Method:	C
Adjustment:	0
<b>Net Total Appraised Parcel Value</b>	<b>211,600</b>

NOTES							

BUILDING PERMIT RECORD								VISIT/ CHANGE HISTORY						
Permit ID	Issue Date	Type	Description	Amount	Insp. Date	% Comp.	Date Comp.	Comments	Date	Type	IS	ID	Cd.	Purpose/Result
1805		RE	Remodel	12,000	03/20/2008	0			01/27/2011			LK	DR	Desk Top Review
									03/20/2008	E	X	BM	BP	Building Permit
									11/30/2006	E		AF	DC	Data Collection
									03/21/2006	E		AD	DC	Data Collection

LAND LINE VALUATION SECTION																		
B #	Use Code	Use Description	Zone	D	Front	Depth	Units	Unit Price	I.	S.A.	C.	ST. Idx	Adj.	Notes- Adj	Special Pricing	S Adj Fact	Adj. Unit Price	Land Value
1	1040	TWO FAMILY	RG-5			431	6,088	11.11	1.0000	1	1.00	20	0.81			.00		54,800
1	1040	TWO FAMILY	RG-5			133	0	1.00	1.0000	0	1.00		0.00			.00		0

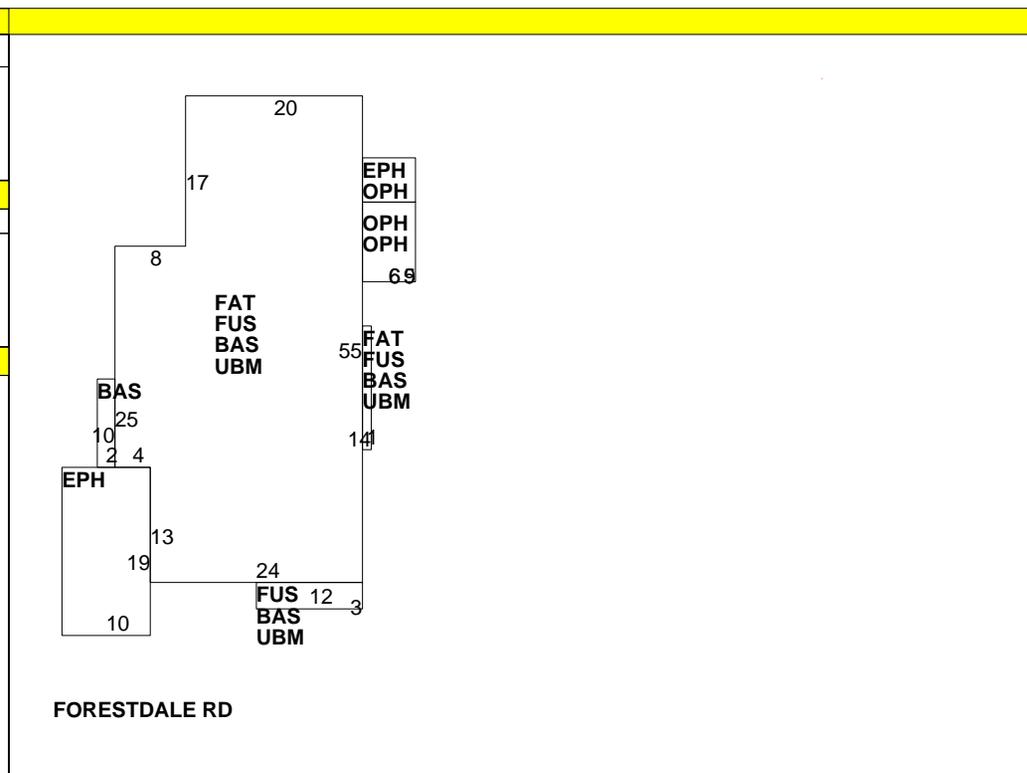
CONSTRUCTION DETAIL				CONSTRUCTION DETAIL (CONTINUED)			
Element	Cd.	Ch.	Description	Element	Cd.	Ch.	Description
Style	2F		Two Family				
Model	02		Two Family				
Grade	40		Average				
Stories	2.1						
Occupancy	2						
Exterior Wall 1	AV		Aluminum/Vinyl				
Exterior Wall 2	WS		Wood Shingle				
Roof Structure	HI		Hip				
Roof Cover	AS		Asphalt				
Interior Wall 1	PL		Plasters				
Interior Wall 2							
Interior Flr 1	HW		Hardwood				
Interior Flr 2							
Heat Fuel							
Heat Type	S		Steam				
AC Type	N		None				
Total Bedrooms	8		8 Bedrooms				
Total Full Bthrms	2						
Total Half Baths	0						
Total Xtra Fixtrs	0						
Total Rooms	14						
Base Area	1422						
Bsmt. SF	1402						
Attic Finish							
Fdn Type	BR		Brick				
Bsmt Type	F		Full				
Fin Bsmt Pct	N		None				
Fin Bsmt Qual							
				Adj. Base Rate:			71.49
				Replace Cost			252,850
				AYB			1915
				Dep Code			A
				Remodel Rating			
				Year Remodeled			
				Dep %			38
				Functional Obslnc			0
				External Obslnc			0
				Cost Trend Factor			
				Condition			
				% Complete			
				Overall % Cond			62
				Apprais Val			156,800
				Dep % Ovr			0
				Dep Ovr Comment			
				Misc Imp Ovr			0
				Misc Imp Ovr Comment			
				Cost to Cure Ovr			0
				Cost to Cure Ovr Comment			

**OB-OUTBUILDING & YARD ITEMS(L) / XF-BUILDING EXTRA FEATURES(B)**

Code	Description	Sub	Sub Descript	L/B	Units	Unit Price	Yr	Gde	Dp Rt	Cnd	%Cnd	Apr Value

**BUILDING SUB-AREA SUMMARY SECTION**

Code	Description	Living Area	Gross Area	Eff. Area	Unit Cost	Undeprec. Value
BAS	First Floor	1,422	1,422	1,422	71.49	101,655
EPH	Enclosed Porch	0	220	132	42.89	9,436
FAT	Attic, Finished	273	1,366	273	14.29	19,516
FUS	Upper Story, Finished	1,402	1,402	1,402	71.49	100,225
OPH	Open Porch	0	138	28	14.50	2,002
UBM	Basement, Unfinished	0	1,402	280	14.28	20,016
<b>Ttl. Gross Liv/Lease Area:</b>		<b>3,097</b>	<b>5,950</b>	<b>3,537</b>		<b>252,850</b>





Michael V. O'Brien  
City Manager

CITY OF WORCESTER

cm2011oct11134941

11.23 A

October 18, 2011

TO THE WORCESTER CITY COUNCIL

COUNCILORS:

In response to City Council's request, the following is meant to provide you with an update relative to the triennial revaluation process and the data collection and analysis for commercial properties.

After further review of City Council's request, it has been determined that a full field review will be conducted on all commercial properties (inclusive of 4-units and above, commercial and industrial, and mixed use) with the expertise of a contracted firm. The attached Request for Proposals (RFP) has been issued and it is our expectation to award a contract by November 1.

This final check of the commercial property data – though not originally recommended by the Department of Revenue (DOR) – was made to ensure that all commercial property data elements are reviewed by a contracted firm consistent with the residential property review. This will ensure that final assessments are based on the most fair and accurate data available.

Upon completion of this scope of work, the City will provide this thorough last review of commercial property data and subsequent determination of values to DOR for their review and analysis to receive their preliminary certification of our valuations. It is expected that the commercial property review will take between two (2) and four (4) months. I will continue to keep you apprised of this process.

Respectfully submitted,

Michael V. O'Brien  
City Manager



**PURCHASING DEPARTMENT  
CITY OF WORCESTER, MA  
ROOM 201, CITY HALL  
WORCESTER, MA 01608  
(508) 799-1220**

**John C. Orrell**

**RFP NO. 5547-J1**

**Purchasing Agent**

**ISSUANCE DATE: October 11, 2011**

**AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER  
REQUEST FOR PROPOSALS  
NOTICE TO PROPOSERS**

**Title: FIELD REVIEW, DATA ACCURACY (Commercial) /  
ASSESSING**

**REFER TO PAGE 8 FOR PROPOSAL SUBMISSION INFORMATION**

**General Conditions**

All proposals are subject to the terms, conditions and specifications herein set forth:

1. Scope: The City of Worcester is seeking proposals to provide field review, data accuracy for the City of Worcester Assessing Division per requirements and specifications contained herein.
2. A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of \_\_N/A\_\_ must accompany this proposal. This must be submitted under separate sealed cover marked "Proposal Security." In the case of default, the surety shall be forfeited to the City as liquidated damages.
3. All terms and conditions are applicable to this proposal except the following section(s) which are hereby deleted from this RFP: \_\_\_\_23-24, 31,35\_\_\_\_\_
4. A performance bond in the amount of \_\_N/A\_\_ will be required. If this proposal is accepted by the City and the Proposer shall fail to contract as set forth in these requirements and to give a bond in the aforementioned amount, within ten (10) days, (not including Sundays, Saturdays, or a legal Holiday) from the date of the mailing of a notice from the City to the Proposer, according to the address given herewith, that the contract is ready for signature, the City may by option determine that the proposer has abandoned the contract and thereupon the proposal and acceptance shall be null and void and the proposal security accompanying this proposal shall become the property of the City as liquidated damages.

5. Any prospective proposer requesting a change in or interpretation of existing specifications or terms and conditions must do so within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal opening date. All requests are to be in writing to the Purchasing Department and are to be in duplicate. No changes will be considered or any interpretation issued unless request is in our hands within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal submission date.

Any inquiries related to technical or contractual matters must be submitted in writing to:

Mr. John C. Orrell  
Purchasing Agent  
City of Worcester, City Hall  
455 Main Street, Room 201  
Worcester, MA 01608  
[orrellj@worcesterma.gov](mailto:orrellj@worcesterma.gov)

6. Nothing herein is intended to exclude any responsible Proposer or in any way restrain competition. All responsible Proposers are encouraged to submit proposals. The City encourages participation by Minority and Women Owned Business Enterprises (M/WBE).
7. The following meanings are attached to the defined words when used in this RFP.
  - a) The word "City" means The City of Worcester, Massachusetts.
  - b) The word "Proposer" means the person, firm or corporation submitting proposal on these specifications or any part thereof.
  - c) The word "Contractor" means the person, firm or corporation with whom the contract is made by carrying out the provisions of these specifications and the contract.
  - d) The words "Firm Price" shall mean a guarantee against price increase during the life of the contract.
8. All proposals and other documents relating to this RFP are subject to the public records provisions of M.G.L. c.30B, and shall remain confidential until the time specified in c.30B section 6 (d).

9. All material submitted by vendors becomes the property of the City. The City is under no obligations to return any of the material submitted by a vendor in response to this RFP.
10. Each vendor's proposal must remain in effect for at least 120 days from the deadline for its submission. The City will decide upon acceptance within 120 days of submission.
11. It is understood and agreed that it shall be a material breach of any contract resulting from this RFP for the Contractor to engage in any practice which shall violate any provision of Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharge, compensation, or terms, conditions or privileges of employment because of race, color, religious creed, national origin, sex, age or ancestry.
12. The City reserves the right to accept or reject any or all of the proposals submitted and waive informalities and technicalities.
13. The City will review and analyze each proposal, and reserve the right to interview selected proposers. The City shall select the proposer, which in the City's opinion, has made the proposal best suited to the needs and goals of the City and its operations and deemed to be in compliance with the terms of this RFP.
14. The Contractor will be required to indemnify and save harmless the City of Worcester for all damages to life and property that may occur due to his negligence or that of his employees, sub-contractors, etc. during the contract derived from this RFP.
15. The Contract Agreement will be drafted by the City's Law Department in compliance with the terms of the RFP, and may incorporate the terms of this RFP and of the proposal selected.
16. The Proposer must certify that no official or employee of the City of Worcester, Massachusetts, is pecuniarily interested in this proposal or in the contract which the proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with the provisions of G.L.C. 43 section 27, and that this proposal is made in good faith without fraud or collusion or connection with

any other person submitting a proposal.

17. Any proposal withdrawn after time and date specified, the proposer shall forfeit deposit on proposal as liquidated damages.
18. A vendor conference will be held on: \_\_\_\_\_ N/A \_\_\_\_\_
19. The Contractor shall not assign, transfer, sublet, convey otherwise dispose of any contract which results from this RFP, or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous consent in writing of the City. Should the Contractor attempt any of the above without the written consent of the City, the City reserves the right to declare the Contractor in default and terminate the contract for cause.
20. The Contractor shall obtain and maintain in force at all times during the term of the contract derived from this RFP, insurance coverage pertaining to Public Liability, Property Damage and Worker's Compensation in the following types and amounts:
  - A) PUBLIC LIABILITY INSURANCE - Contractor to supply the City of Worcester with certificates of insurance evidencing general liability coverage of not less than \$1 million per occurrence / \$2 million aggregate.
  - B) PROPERTY DAMAGE INSURANCE - Contractor to supply the City certificates of insurance evidencing automobile liability coverage, bodily injury and property damage combined single limit of \$1 million (for all owned, hired and non-owned vehicles).
  - C) COMPENSATION INSURANCE - The Contractor shall furnish the City with certificates showing that all its employees shall be connected with the management operations are protected under Massachusetts worker's compensation insurance policies.
21. The Contractor shall carry Public Liability Insurance with an insurance company satisfactory to the City so as to save the City harmless from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Contractor or for anyone in his employ during the execution of the contract derived from this RFP.

22. Prior to starting on the contract derived from this RFP, the Contractor shall deposit with the Purchasing Department, certificate from the insurer to the effect that the insurance policies required in the above paragraph have been issued to the Contractor. The certificates must be on a form satisfactory to the City.
23. All prices quoted must include inside delivery, and set-up in place F.O.B. destination to pre-designated City of Worcester departments.
24. No special charges will be allowed for rigging, packing, crating, freight, express, or carriage unless specifically stated and included in the vendor's proposal.
25. The award to the successful proposer may be cancelled in the event of vendor nonperformance as may be determined by the City.
26. The successful proposer shall comply with all applicable federal, state and local laws, ordinances, and regulations. The awarded contract shall be governed under the laws of the Commonwealth of Massachusetts.
27. Purchases made by the City are exempt from Federal and Massachusetts state taxes and proposal prices must exclude any such taxes. Tax exemption certificates will be furnished upon request.
28. When the contract is executed, a performance bond, in the full amount of the contract, is required. See paragraph 4. The bond will be of a surety company qualified to do business under the laws of the Commonwealth of Massachusetts. The cost of this bond is the vendor's responsibility. Bonds shall remain in force and effect thru the performance of the contract.
29. Expenditures by the City and authorization to spend for particular purposes are made on fiscal year basis. The City's fiscal year is the twelve month period ending June 30 of each year. The obligations of the City under any agreement to be reached are subject to the appropriation or authorization of the necessary funds. The City agrees to make reasonable efforts to obtain funding and all necessary authorization.
30. No amendment to the contract shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the City of Worcester.

31. The vendor (and its insurers, if any) shall bear all risk of loss or damage to the equipment which occurs in transit to the user site. The risk of loss or damage to purchased equipment shall remain with the vendor until the purchase price has been paid and title has passed. The vendor shall also bear the risk of loss or damage to leased or rented equipment during the City of Worcester's possession and use thereof subject, however to such conditions and limitations as may be stated elsewhere in the contract.
32. The vendor shall not assign or in any way transfer any interest in the contract without the prior written consent of the City provided, however, that claims for money due or to become due to vendor from the City may be assigned to a bank, trust company, or other financial institution without such consent so long as notice of such assignment is furnished promptly to the City. Any such assignment shall be expressly made subject to all defenses, set-offs, or counter-claims which would have been available to the City against the vendor in the absence of such assignment.
33. None of the services to be provided by the vendor pursuant to the contract shall be subcontracted or delegated to any other organization, association, individual, corporation, partnership or other such entity without the prior written consent of the City. No subcontract or delegation shall relieve or discharge the vendor from any obligation or liability under the contract except as specifically set forth in the instrument of consent. Any subcontract to which the City has consented shall be attached to the original of the contract on file in the City of Worcester.
34. Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight, embargoes, and unusually severe weather. If the vendor's failure to perform is caused by the default of the subcontractor, and if such default arises out of causes beyond the reasonable control of both the vendor and the subcontractor, and without the fault or negligence of either of them, the vendor shall not be liable for any excess costs for failure to perform, unless the equipment or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the vendor to meet the required delivery schedule. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

35. The vendor shall provide to the City of Worcester a warranty and a commitment which clearly states that all equipment and services proposed and supplied by the Vendor, and/or its subcontractors, performs as expected and promised by the Vendor.
36. The vendor represents that no person other than bona fide employees working solely for the vendor, have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award or making of this contract. For breach or violation of the representation, the City shall have the right to annul the contract without liability, or in its discretion to deduct from the contract price or consideration, or otherwise recover the full amount of such commission, percentage, brokerage fee or other consideration.
37. Any contract made by the City in which the Purchasing Agent or any employee of his department, the heads of using agencies or any other officer or employee of the City having a part in the placing of such contract is financially interested, directly or indirectly, shall be void.
38.
  - a) The vendor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion or medical handicap. The vendor agrees to comply with all applicable Federal and State Statutes, rules and regulations prohibiting discrimination in employment including: Title VII of the Civil Rights Acts of 1964; The Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; Massachusetts General Laws Chapter 151B, Section 4 (1) and all relevant administrative orders and executive orders.
  - b) If a complaint or claim alleging violation by the vendor of such statutes, rules or regulations is presented to the Massachusetts Commission Against Discrimination (MCAD), the vendor agrees to co-operate with the MCAD in the investigation and disposition of such complaint or claim.
  - c) In the event of vendor noncompliance with the provisions of this section, the City shall impose such sanctions as it deems appropriate, including but limited to:
    - 1) Withholding of payments due vendor under the contract until vendor complies.
    - 2) Termination or suspension of the contract.

**SUBMISSION OF PROPOSALS**

39. Proposals must be submitted in two (2) packages according to the instructions below. The City intends to consider responses in the evaluation requirements before considering costs, therefore, no reference to pricing may be made in the proposal of evaluation considerations.

A sealed package containing the original and 2 copies of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Field Review, Data Accuracy (Commercial) -- Evaluation Response**

**455 Main Street, Room 201  
Worcester, MA 01608**

Re: **RFP No.**

A sealed package containing the original and 2 copies of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Field Review, Data Accuracy (Commercial) - Costs**

**455 Main Street, Room 201  
Worcester, MA 01608**

Re: **RFP No.**

Bid Surety must be submitted under separate cover as stated under condition 2 of this RFP. Proposals must be delivered no later than **OCTOBER 31, 2011, 10AM LOCAL TIME**. Late submissions will be rejected, regardless of circumstances. The City of Worcester is not responsible for submittals not properly marked.

The evaluation and cost proposals will remain confidential until a formal and finalized contract has been executed.

**Names of respondents will be available on the City of Worcester Purchasing Department website as soon as possible following due date. Please go to [www.worcesterma.gov](http://www.worcesterma.gov) to obtain this information.**

## RFP EVALUATION

40. The City of Worcester Purchasing Agent will assign an evaluation team, hereafter referred to as the Selection Committee, to perform a full and complete evaluation of RFP submittals. The Purchasing Agent will ultimately forward a formal recommendation of award to the City Manager who has final award authority.
  
41. RFP evaluation responses will be evaluated by the Selection Committee based directly upon vendor's response to mandatory and comparative evaluation criteria. Vendors must meet or exceed the mandatory criteria requirements or be rejected as non-responsive.

Comparative criteria will be evaluated by the use of four rating categories as set forth by M.G.L. Chapter 30B:

- 1) HIGHLY ADVANTAGEOUS - Vendor's submittal meets all the stated requirements and offers significant performance above the stated requirements.
- 2) ADVANTAGEOUS - Vendor's submittal meets the stated requirements without risk or disadvantage.
- 3) NOT ADVANTAGEOUS - Vendor's submittal contains some risk or disadvantage but is not unacceptable.
- 4) UNACCEPTABLE - Vendor's submittal fails to meet the standards of the stated requirements.

After proposals have been assigned ratings on the basis of each evaluation criterion, a composite rating will be established by the Selection Committee. Submittals will then be ranked based upon finalized composite rating.

42. The Purchasing Agent will identify the most advantageous proposal based upon the rankings of the Selection Committee and an evaluation of the cost proposals received. The Purchasing Agent will forward a recommendation for award to the City Manager based upon the most advantageous proposal received considering evaluation rankings and cost proposals received.

GIVE FULL NAMES AND RESIDENCES OF ALL PERSONS INTERESTED IN THE FOREGOING PROPOSAL.

(NOTICE: Give first and last name in full; in case of corporations, give corporate name and names of President, Treasurer, and Manager; and in case of firms give names of the individual members)

Name	Address	Zip Code
_____	_____	_____
_____	_____	_____
_____	_____	_____

KINDLY FURNISH THE FOLLOWING INFORMATION REGARDING BIDDER:

<p>(1) If a Proprietorship</p> <p>Name of Owner _____</p> <p>Business Address _____</p> <p>Zip Code _____ Telephone No. _____</p> <p>Home Address _____</p> <p>Zip Code _____ Telephone No. _____</p>
---



**GIVE THE FOLLOWING INFORMATION REGARDING SURETY COMPANY**

Full Legal Name of Surety Company \_\_\_\_\_

State of Incorporation \_\_\_\_\_ Admitted in Massachusetts ? Yes \_\_\_ No  
\_\_\_\_\_

Principal Place of Business

\_\_\_\_\_  
Street P.O. Box  
\_\_\_\_\_  
City/Town State Zip

Place of Business in  
Massachusetts

\_\_\_\_\_  
Street P.O. Box  
\_\_\_\_\_  
City/Town State Zip  
Telephone No. \_\_\_\_\_

**NOTE:**

The Office of the Attorney General, Washington, D.C. requires the following information on all bid proposals amounting to \$1,000.00 or more.

E.I. Number of bidder \_\_\_\_\_

This number is regularly used by companies when filing their "EMPLOYER'S FEDERAL TAX RETURN, U.S." Treasury Department Form 941.

AUTHORIZED SIGNATURE OF BIDDER \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

UNDER MASSACHUSETTS GENERAL LAWS, CHAPTER 30B: SECTION 10, THE FOLLOWING CERTIFICATION MUST BE PROVIDED:

Section 10. A person submitting a bid or a proposal for the procurement or disposal of supplies, or services to any governmental body shall certify in writing, on the bid or proposal, as follows:

"The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals."

(Please Print) \_\_\_\_\_  
Name of Person Signing Bid

\_\_\_\_\_  
Signature of Person Signing Bid

\_\_\_\_\_  
Company

No award will be made without vendor certification of the above.

**COST PROPOSAL SHEET (to be submitted under separate cover as per instructions)**

**Pricing to include all labor, travel, expenses, etc. Price quoted must be total sum for services with no additional charges listed. Any exceptions may result in proposal rejection**

**A. Provide services as described within as fixed-fee lump sum based on scope of services contained herein**                      \$ \_\_\_\_\_  
**TOTAL**

**Proposer Name** \_\_\_\_\_

**Proposer Representative** \_\_\_\_\_

**Date** \_\_\_\_\_

### **Scope of Services**

- An exterior field review from the nearest public road of all parcels in the City of Worcester comprising all Commercial, Industrial, Apartment and Mixed Use properties with the following parcel counts:

300 Class (Commercial):	2,314
400 Class (Industrial):	619
111-125 (Apartment):	1,222
Mixed Use:	607

- Verify the consistency of data from parcel records provided by the City in accordance with the City of Worcester Data Collection Manual.
- Indicate corrections where necessary to the existing records in a clear manner for data entry by the City of Worcester Assessing staff. This includes story height, building components, measurement of all structures, listing of extra items (canopies, free standing signs, etc.), grades and conditions. If measurements appear incorrect, Contractor shall provide a list to the City in order to re-measure the structures.
- All data review must be completed and returned to the City by December 30, 2011. Award to successful offeror will be no later than November 1, 2011.
- Data collector will confirm the accuracy of the existing photo and provide replacement photos when required.
- Property cards will be given to the Assessing Office daily so that the City can key-enter the data.

### **Mandatory Requirements**

Proposer to supply references of all similar services provided in the past three years. Include names, phone number and e-mail address for all references.

Proposer to supply resumes of all key people that will be involved in this effort.

Proposer to prepare and furnish with proposal a proposed plan of services detailing approach to project, timelines and all relevant details.

## Comparative Criteria

### 1) Professional Qualifications.

Highly Advantageous: proposal demonstrates that the consultant team members have specific and direct experience with services contained herein.

Advantageous: proposal demonstrates that the consultant team members are qualified but have no direct experience with services contained herein.

Unacceptable proposal does not demonstrate specific or direct experience with services contained herein.

### 2) Commercial Experience.

Highly Advantageous: proposal demonstrates that the consultant team members have specific and direct experience with Commercial, Industrial and Apartment properties contained herein.

Advantageous: proposal demonstrates that the consultant team members are qualified but have no direct experience with Commercial, Industrial and Apartment properties contained herein.

Unacceptable proposal does not demonstrate specific or direct experience with Commercial, Industrial and Apartment properties contained herein

### 3) Plan of services

Highly Advantageous Proposer provides a plan of services that the City considers superior in approach

Advantageous Proposer provides a plan of services that the City considers satisfactory in approach

Unacceptable Proposer provides a plan of services that the City considers non-satisfactory in approach



Michael V. O'Brien  
City Manager

CITY OF WORCESTER

cm2012jan27152129

Attachment for Item #

8.23 A

January 31, 2012

TO THE WORCESTER CITY COUNCIL

COUNCILORS:

The following information relative to the City's triennial revaluation is forwarded for the information of your Honorable Body.

I am pleased to inform you that the City has completed the data collection and analysis phase on **all 48,000 real estate parcels in the City**. Independent and City assessors inspected and reviewed each and every residential and commercial property-all of the data compiled from these reviews has been entered and recorded into the City's new assessment system (Vision), and verified for accuracy and consistency. The following provides the detail of the thoroughness of this phase:

- 1.) City assessors first inspected all 48,000 parcels with the use of state-of-the-art technology. This technology created a clear, three-sided image for all 48,000 parcels on a computer for assessors to review and gather property data. Assessors compared all this data with existing property records and updated information accordingly, if this "virtual" inspection revealed changes.
- 2.) City and independent assessors then conducted physical inspections on properties (specifically for new construction/ additions; at a property owner's request; and/ or when the virtual review did not provide enough of a visual for an assessor to make a determination).
- 3.) An independent firm was concurrently retained to conduct a data quality and reliability study, in which the firm field-sampled data from these inspected properties to compare against the data that had been entered into the property record. These results were then reported back to Department of Revenue (DOR).
- 4.) Finally, we contracted an appraisal company to conduct "full field reviews" on all 48,000 residential and commercial properties for review of quality and consistency of the data that had been entered into the records for the entire inventory of parcels. This review included drive-by exterior inspections; checking for specific features of the land and the buildings that contribute to a property's value (e.g., size, type, quality of construction, condition), and if warranted, on-site or interior inspections.

This phase of work is complete. The DOR is now in the process of performing its own Data Quality Study, similar to ours, in which their representatives will field verify sample



OFFICE OF THE CITY MANAGER, CITY HALL, WORCESTER, MA 01608  
TELEPHONE (508) 799-1175 | FAX (508) 799-1208  
EMAIL: [citymanager@worcesterma.gov](mailto:citymanager@worcesterma.gov)



data from inspected properties and compare this data with what has been entered into the City's assessment system.

As stated before, this is the most comprehensive review of the City's 48,000 real estate parcels in over 30-plus years. The collection and maintenance of current and accurate property data is a critical element in the development of uniform, fair market values. Our values are recertified by the DOR every three years as has been the case through the last revaluation year of 2008. State regulation requires that we also field review these 48,000 parcels, including tax-exempt parcels, at least once in a 9 year rolling cycle. It is evident from this comprehensive effort that we have undertaken that this was not always the case, and in some circumstances, properties may not have been field reviewed in more than 25-30 years.

## **NEXT PHASE—DETERMINATION OF VALUES**

The next phase of work includes the development of values for submission to the Department of Revenue (DOR) for review and preliminary certification. Upon DOR's completion of their Data Quality Study, we will submit these property values. Commercial Property Values are determined utilizing an income and expense approach; Residential Property Values are determined utilizing the market or comparable sales approach.

DOR will then perform a value analysis on all properties based on sales, market rent information and actual income and expense submissions. Once this analysis is complete, the DOR will issue the City a preliminary certification of these values. At this point, we will begin the public disclosure process.

## **PUBLIC DISCLOSURE PROCESS**

With and upon the issuance of a preliminary certification of these values from DOR, the City will mail **all** City property owners their property record information and assessed value (see attached examples for both residential and commercial). As discussed at the Standing Committee on Municipal Operations, when possible, we will attempt to highlight where fluctuations in values occur between years. This will initiate the public disclosure process.

It is the intention of the City to hold public hearings in at least five areas of the City (by District). This will allow residents to attend a meeting with City assessors to learn more about the process and how values were determined and ask questions. City assessors will be able to answer questions on specific properties.

Additionally, the Assessor's Office will hold office hours (after 5 PM) at the Worcester Public Library to provide access to residents. Residents will be able to make an appointment to meet with an assessor and review their information and ask questions. If warranted, we will also accommodate weekend hours. We will provide a schedule to the public and this information will be disseminated as part of the mailing.

Lastly, we are working with the DPW Customer Service Center to assist in answering phone calls from residents. Residents will be instructed to call 508-929-1300 to speak to a Customer Service Representative, who will be cross-trained with assessing staff to provide basic information to the caller, field telephone inquiries, take messages, and

make appointments. This information will be tracked in the computer system to ensure that every call receives a response and for quality assurance.

We will use all available communication tools to inform residents of this information. I will provide City Council with a complete schedule of the public disclosure process once finalized.

In my tenure as City Manager, working closely with the City Council, this community, and a talented City team, we have restructured and reformed City departments and divisions from the baseline of an intense review of systems, policies, procedures and operations, to sweeping changes in all these areas/ arenas, to adhere to all new laws and regulations, to better serve the public, to strengthen accountability, to increase transparency and to ensure efficiency —from public safety; to inspectional services and code enforcement; to neighborhoods and housing, etc. The Assessor's Office, though a smaller division with only nine (9) employees is an important Division and the work that we have undertaken has been arduous and time-consuming but critical toward achieving fair and accurate assessments. It has also enabled us to formalize and update processes and policies, to implement significant cross checks and automatic data feeds (building permits), to dramatically improve transparency, to enhance customer service and to ensure accuracy and consistency in data collection/ entry and analysis moving forward.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Michael V. O'Brien", with a long horizontal flourish extending to the right.

Michael V. O'Brien  
City Manager



# CITY OF WORCESTER ASSESSMENT DEPARTMENT PARCEL INFORMATION

### Ownership Information

SMITH, JOHN  
16 SUNSHINE PL  
WORCESTER, MA 01604

### Parcel Data

Parcel ID 23-456-00789  
Address 16 SUNSHINE PL  
Lot Size 0.22  
Type SINGLE FAMILY

FY2012 Assessment as of January 01, 2011, statutory lien date.

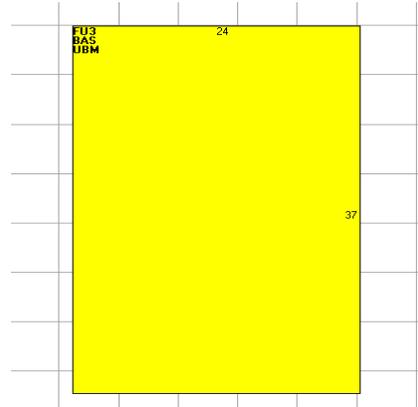
ASSESSED VALUE	BUILDING 1 OF 1
<i>FY2012 Building value:</i> \$ 169,900	<i>Style:</i> CAPE COD
<i>FY2012 Land Value:</i> \$ 52,700	<i>Structure:</i> 1554
	<i>Condition:</i> GOOD
<i>FY2012 Total Assessed Value:</i> \$ 222,600	<i>Exterior Wall:</i> ALUM/VINYL
<i>FY2011 Total Assessed Value:</i> \$ 165,700	<i>Roof Material:</i> ASPHALT
<i>Percentage Change</i> 34.339%	<i>Grade:</i> AVG/GOOD
<i>Last Sale Date:</i> 2/24/1999	<i>Stories:</i> 1.75
<i>Last Sale Price:</i> \$ 116,900	<i>Total Rooms:</i> 6
<i>Zoning</i> RL-7	<i>Bedrooms:</i> 3
	<i>Bathrooms:</i> 2
	<i>Half Bathrooms:</i> 0
	<i>Basement:</i> UNFIN/888
	<i>Heat Type:</i> FORCED AIR
	<i>Air Conditioning:</i> NONE
	<i>Fireplaces:</i> 0.0

NOTE: BLDG PERMIT #2563 \$109,242

### PICTURE:



### SKETCH:





# CITY OF WORCESTER ASSESSMENT DEPARTMENT PARCEL INFORMATION

### Ownership Information

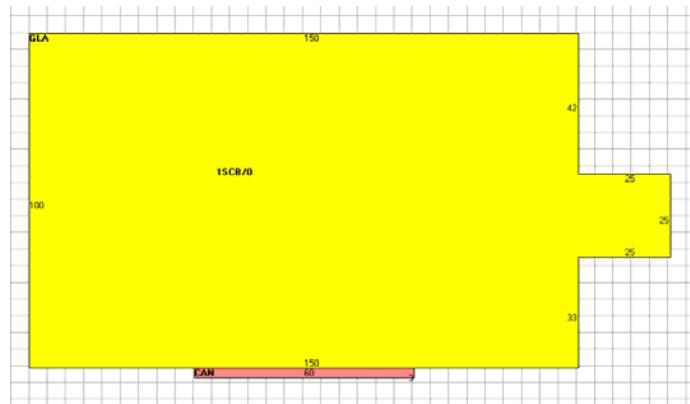
ABC CORP  
123 MAIN ST  
WORCESTER, MA 01608

### Parcel Data

Parcel ID 45-678-00112  
Address 123 MAIN ST  
Lot Size 1.15  
Property Type RETAIL>10,000

FY2012 Assessment as of January 01, 2011, statutory lien date.

<b>ASSESSED VALUE</b>	<b>BUILDING 1 OF 1</b>
<i>FY2012 Building value:</i> \$ 547,300	<i>Style:</i> RETAIL>10,000
<i>FY2012 Land Value:</i> \$ 370,300	<i>Square Feet of Living Area:</i> 15,625
	<i>Construction:</i> AVERAGE
	<i>Exterior Wall:</i> BRICK
<i>FY2012 Total Assessed Value:</i> \$ 917,600	<i>Roof Material:</i> RUBBER
	<i>Grade:</i> AVERAGE
<i>FY2011 Total Assessed Value:</i> \$ 994,000	<i>Rental Description:</i> RETAIL>10,000
<i>Percentage Change:</i> -8.95%	
<i>Last Sale Date:</i> 8/2/1995	
<i>Last Sale Price:</i> \$ -	
 <i>Zoning:</i> BG-4	 <i>Heat/AC Type:</i> PACKAGE UNIT





# CITY OF WORCESTER ASSESSMENT DEPARTMENT PARCEL INFORMATION

### Ownership Information

XYZCORP  
456 CENTRAL ST  
WORCESTER, MA 01608

### Parcel Data

Parcel ID 56-789-01213  
Address 456 CENTRAL ST  
Lot Size 0.83  
Property Type APT >8

FY2012 Assessment as of January 01, 2011, statutory lien date.

ASSESSED VALUE		BUILDING 1 OF 1	
<i>FY2012 Building value:</i>	\$ 1,524,800	<i>Style:</i>	APT >8
<i>FY2012 Land Value:</i>	\$ 312,500	<i>Square Feet of Living Area:</i>	26929
<i>FY2012 Total Assessed Value:</i>	\$ 1,837,300	<i>Condition:</i>	GOOD
<i>FY2011 Total Assessed Value:</i>	\$ 111,600	<i>Exterior Wall:</i>	CLAPBOARD
<i>Percentage Change</i>	1546.326%	<i>Roof Material:</i>	ASPHALT
<i>Last Sale Date:</i>	3/7/2010	<i>Grade:</i>	GOOD
<i>Last Sale Price:</i>	\$ 400	<i>Rental Description</i>	APT >8
<i>Zoning</i>	BL-1	<i>1 BEDROOM</i>	3
		<i>2 BEDROOM</i>	19
		<i>3 BEDROOM</i>	3
		<i>Heat/AC Type:</i>	HOT WATER

EXAMPLE

NOTE: BLDG PERMIT #1393 \$3,450,202

