Township of Haddon

Request for Proposals For the Revaluation of All Real Property

Township of Haddon

PROPOSAL SUBMISSION INSTRUCTIONS

1. <u>Introduction</u>

In order to undertake the revaluation of all real property in the Township of Haddon, the Township of Haddon is soliciting through the "Fair and Open Process" and in accordance with the New Jersey Local Unit Pay-to-Play Law, <u>N.J.S.A.</u> 19:44A-20.5, *et seq.*, a response to the Request for Proposal from qualified interested person(s) and or firm(s) capable of providing professional revaluation services, for the project entitled "Township of Haddon Revaluation of all Real Property." The person(s) and/or firm(s) primary goal will be to prepare and execute a complete program for the revaluation of all properties within the municipal boundaries of the Township of Haddon ("Township").

Through the Request for Proposal ("RFP") process specifically described herein, person(s) and/or firm(s) ("Company") interested in performing and assisting the Tax Assessor with the provision of such services must prepare and timely submit a sealed proposal in accordance with the procedures and schedule set forth in this RFP.

2. Important Notice

These revaluation specifications exceed the State of New Jersey's sample revaluation contract requirements.

Respondents are cautioned to carefully examine all attached documents including the proposed revaluation contract specifications and general requirements prior to the submission of their written proposal. These documents have been specifically designed and prepared for the Township of Haddon. They provide for specific qualifications, actions, and for the timely and accurate reporting of the revaluation of all real property located in the Township of Haddon.

3. <u>Submission of Proposals</u>

All written proposals must be received by the Township of Haddon, Township Clerk's Office, 2nd Floor by **2:00 p.m.** on **Thursday**, **June 8th**, **2023**. Postmark dates bearing this time and date <u>are not</u> acceptable. Any written proposals received after the above specified date and time <u>will not</u> be accepted or considered and shall be returned to the Company unopened.

The written proposals can be delivered using the U.S. Postal service, overnight delivery or can be delivered in person. Proposals <u>cannot</u> be delivered via facsimile or email. The written proposals shall be addressed and/or submitted to the following:

Township of Haddon Attention: Township Clerk 135 Haddon Ave Haddon Twp., NJ 08108-2739

The Company shall submit one (1) original and six (6) copies of its written proposal in a sealed package, addressed as shown above, bearing the Company's full corporate name and address and said package must be clearly marked as follows:

"Revaluation Proposal – Township of Haddon"

4. <u>Conditions Applicable to RFP</u>

Upon submission of a response to the RFP, the Company acknowledges and consents to the following conditions relative to the submission, review and consideration of this Request for Proposal:

- A. The Township of Haddon assumes no responsibility and no liability for costs incurred by the responding firms prior to the issuance of a contract. All costs incurred by the Company in connection with preparation of its proposal shall be borne solely by the Company. Accordingly, the Company shall not include any such expense as part of its proposal.
- B. The Township of Haddon reserves the right to reject any and all RFP responses, and make the award based on the best interest of the Township of Haddon.
- C. The Township of Haddon will automatically reject any proposal submitted that intends to rely on or use any other computer aided mass appraisal system CAMA other than the BRT Power CAMA and Power Pad computer aided mass appraisal system as specified throughout the bid specifications. In addition, any proposal that intends to utilize another CAMA system and convert that data into the BRT Power CAMA and Power Pad software is unacceptable and will cause an automatic rejection/disqualification of the proposal submitted.
- D. The Township of Haddon reserves the right to waive any formalities in the Proposal submission and selection process.
- E. The Township of Haddon reserves the right, without prior notice, to supplement, amend or otherwise modify this RFP, or otherwise request additional information.
- F. The Township of Haddon may request the responding Companies to send representatives to the Township for interviews
- G. Any and all responses to this Request for Proposal not received by the Township of Haddon by the prescribed time stated herein will be rejected
- H. The Township of Haddon reserves the right to withdraw this RFP at any time without prior notice and the Township makes no representations that any contract will be awarded to any Company responding this RFP.
- I. The Township of Haddon reserves the right to postpone the Request for Proposal opening for its own convenience.
- J. The Township of Haddon can change or alter the schedule for any events called for in the RFP upon the issuance of notice to all prospective Companies who have received a copy of this RFP.

5. <u>Selection of Respondent</u>

The selection of the Company will be based on the response proposal that is most responsive, qualified and acceptable to the Township of Haddon.

The Township of Haddon reserves the right to waive technicalities and formalities in response to the RFP where deemed advisable in protection of the best interest of the Township. The Township reserves the right, as the Township deems necessary, to investigate any or all qualification claims made by any or all person(s) or firm(s) prior to submitting their respective response to the RFP, to request clarification of the information provided and/or to request additional information to support the claims made and included in any RFP.

The Township of Haddon reserves the right to interpret all responses to the RFP packages and waive any ambiguities therein for the best interest of the Township.

The Township of Haddon may suspend or terminate the procurement process described in this RFP at any time (in its sole discretion). If terminated, the Township

may determine to commence a new procurement process or exercise any other rights provided under applicable law without any obligation to the Companies.

The Township of Haddon shall be under no obligation to complete all or any portion of the procurement process described in this RFP.

6. Evaluation Procedure and Criteria

Authorized personnel from the Township of Haddon will review all responses to this RFP received to determine if they are responsive and otherwise adhere to requirements prescribed in the RFP.

The Township of Haddon may request a discussion and/or presentation from the Company for further evaluation of its proposal. All proposals submitted will be reviewed and evaluated by various authorized Township personnel from Finance, Legal, Administration and Tax Assessment departments. The proposals will be reviewed to determine if the Company has included mandatory proposal submissions (i.e. business registration, financial statements, insurance requirements, etc.) as well as, met the minimum professional and administrative requirements described in this RFP. Under no circumstances will any authorized Township personnel review responses to an RFP for a job in which they or their firm submitted a response. Based upon the totality of the information contained in the response to the RFP, including information about the reputation and professional experience of each Company, the Township of Haddon will (in its sole judgment) determine which Companies are qualified (from professional and administrative standpoints).

The Township of Haddon shall award the contract based on an evaluation and ranking which shall include technical, management and cost related criteria.

The following shall be used as the criteria for evaluating proposals submitted in response to this RFP:

1. Technical Criteria (30 percent):

(A) Proposed methodology:

- a. Demonstration of a clear understanding of the scope of work and related objectives.
- b. Completeness and overall responsiveness to specifications and general requirements.
- c. Documentation of past performance of vendor's proposed methodology.
- d. Use of innovative technology and techniques.
- (B) Public Relations:
 - a. The description, nature and extent of a vendor's public relations program pre-revaluation, ongoing and post-revaluation. Include samples(s) of materials (literature and publications) and inter-active website address.
 - b. The description, nature and extent of the Company's information taxpayer hearing process.

2. Management Criteria (40 percent):

- a. Project Management Plan of work.
- b. Scheduling time-line.
- c. Revaluation status report compliance.
- d. Description and type of quality control and assurance programs for the accurate collection of field data.
- (A) History and experience in performing the work:
 - a. History and successful use of the BRT Power CAMA system.
 - b. The ability to demonstrate a successful track record of service as

evidenced by on-time, on-budget, and contract compliance performance.

- c. Description of quality control procedures to ensure the accurate valuation of all real property.
- d. Present and past litigation, threatened litigation, and alternate dispute resolution experience as a result of being contracted to perform a revaluation or re-assessment.
- e. The demonstrated ability of having successfully completed a recent revaluation project(s) with similar valuation characteristics, traits and demographics to that of Township of Haddon.
- (B) Availability of personnel, facilities, equipment and other resources:
 - a. The ability to demonstrate the capability to successfully complete the revaluation of the Township on-time for the 2025 tax year.
 - b. Company's current revaluation & reassessment workload.
 - c. The availability to have at a minimum of six (6) existing qualified, trained and competent in-house field personnel with a minimum of 6 months experience currently available to start the Township's Revaluation. Additionally, all field persons shall be subjected to criminal background checks and have no prior criminal histories. Field person will not be changed or substituted during the entire process of the revaluation for the Township.
 - d. Knowledge & use of the BRT Power CAMA System.
 - e. The amount of actual documented experience utilizing the BRT Power CAMA imaging software.
 - f. The number of Certified Tax Assessors (CTA's) on staff.
 - g. The number of Certified General Real Estate Appraisers (SCGREA) on staff.
 - h. The number of Certified Residential Real Estate Appraisers (SCRREA) on staff.
 - i. Qualifications of staff.
 - j. Proof of an inter-active web site.
 - k. The availability and ability to deliver experienced bi-lingual inspectors, mailings and notifications.

3. Cost and Proposal Compliance Criteria (30 percent):

- (A) Cost of services to be provided to be performed:
 - a. Relative cost: How does the cost compare to other similarly scored proposals.
 - b. Full explanation: Is the price and its component charges, fees, etc. adequately explained or documents.
 - c. Assurances of performance.

7. Proposal Format and Content

In order to facilitate the analysis of responses to the RFP, Companies are required to prepare their response in accordance with the instructions outlined in this section. The Township may deem any written proposals that deviate from these instructions as non-responsive and may use its discretion to disqualify such written proposals.

The response should be based on the content included herein. Complete all items for the scope of work as part of the response and include any addendum to the RFP.

The response should be prepared in such a manner as to provide a straightforward, concise description of the Company's capabilities to satisfy the requirements of this RFP. Emphasis should be placed on accuracy, comprehensiveness, and clarity of the content. All parts, pages and tables should be numbered and clearly labeled.

The Township reserves the right to waive any technical non-conformance with the terms of the RFP. Proposals should be organized into the following parts:

- 1. Letter of Transmittal
- 2. Executive Summary
- 3. Company's Background
- 4. Company's qualifications to perform the revaluation of all real property in the Township of Haddon.
- 5. Company's Organizational Chart
- 6. Company's Project Manager who will be assigned to manage this project & what other projects and duties this individual will manage or perform.
- 7. Company's field inspectors who will be assigned to the Township of Haddon's revaluation.
- 8. Acknowledgement of submission of required documents (Appendix A)
- 9. An executed Letter of Qualification(s) (Exhibit 1)
- 10. Letter of Intent (Exhibit 2)
- 11. Executed Disclosure Statement (Exhibit 3)
- 12. Affirmative Action Statement (Exhibit 4)
- 13. Mandatory Language: Americans with Disabilities Act of 1990 (Exhibit 5)
- 14. NJ Business Registration Certification (Exhibit 6)
- 15. A Notarized Non-Collusion Affidavit (Exhibit 7)
- 16. Certificate of Liability Insurance and Surety (Exhibit 8)
- 17. Certificate of Pay-To-Play annual disclosure statement in accordance with <u>N.J.S.A.</u> 19:44A-20.26 *et seq.* (Exhibit 9)
- 18. Conflict of Interest Certificate (Exhibit 10)
- 19. A Certification signed by the Company President detailing any pending, on-going or finalized litigation, disputes, or fines with the last five (5) years against your Company. If none, please state "NONE" (Exhibit 11)

THE COMPANY MUST SUBMIT AN ORIGINAL PROPOSAL RESPONSE PACKAGE ALONG WITH SIX (6) COPIES.

A. Letter of Transmittal

The letter of Transmittal shall be addressed to the Township Clerk; and must, at a minimum, contain the following information:

Identification of the Company, including name, address, and telephone number. Acknowledgement of receipt of the Request of Proposal addenda, if any. Name, title, address and telephone number of the Company's contact person during the period of proposal evaluation.

B. Executive Summary

The Executive Summary (one page) should state key highlights of the Company's qualifications. Ability to successfully manage and timely complete this revaluation project using the BRT Power CAMA system, description of procedure to identify neighborhoods/VCS's for valuation, quality control procedures and why you believe your firm is most capable of completing the highest quality revaluation.

C. Company's Background and Qualifications

The Company must provide information about their firm to allow evaluation of the Company's stability and ability to support the commitments set forth in response to this RFP. The Company should detail their firm's status, including a brief description of the firm, past history, present status including the number of revaluation and reassessment projects to be completed for 2025, current company headcount identifying position/title, company size, types of services offered and its organizational structure. Indicate the year the business was founded and the form of the organization (corporation, partnership, sole proprietorship, etc.). Identify and subsidiary company(ies), the nature and type of work

performed and if any of the work performed involves representing property owners as a plaintiff's expert in any capacity against municipalities in the State of New Jersey.

Provide a minimum of three (3) references from the most recent revaluations performed closest in distance to the Township of Haddon and include the name, title, address and telephone number of the person(s) at the client organization who is most knowledgeable about the work performed.

In the statement, please provide responses to the following:

- 1. A history of the person's or firm's experience in providing revaluation services to municipalities or other governmental entities, private developers, not -for- profits and civic organizations.
- 2. A description of the business organization (i.e., corporation, partnership, joint venture, etc.) of each firm, its ownership and its organizational structure, principals, project manager(s) and professional staff, including bi-lingual staff (identifying their languages of fluency) who would work directly with the Township. Include all key staff that will have major roles and responsibilities for each individual.

Provide the names and addresses of all Principals of the Company submitting the proposal. Principals shall include each investor who would have any amount of operation control over the Company and every stockholder having an ownership interest of 10% or more in the Company.

If a firm is a partially owned or a fully-owned subsidiary of another firm, identify the parent Company and describe the nature and extent of the parents' approval rights over the activities of the firm submitting a proposal. Describe the approval process.

If the Company is a partnership or a joint venture or similar organization, provide comparable information as required above for each member of the partnership, joint venture or similar organization.

- 3. A statement that the Company is in compliance with all applicable affirmative action (or similar) requirements with respect to its business activities, together with evidence of such compliance.
- 4. Confirm appropriate Federal and State licenses to perform the revaluation of all real property.
- 5. Describe the portions of the Company's services, if any, that are subcontracted out. If so, provide business registration certificates for all sub - contractors.
- 6. Does the Company employ union or non-union employees?

D. Company's qualifications to perform scope of service.

In this section of the proposal the Company should establish the ability to satisfactorily perform the required work by reasons of experience in performing work of a similar like, kind and nature and demonstrated competence in the services to be provided.

1. Purpose

These specifications describe the revaluation of all real property within the Township of Haddon which the Company is to complete, and list all requirements necessary for entering into a contract for performing this revaluation.

Listed below are some facts about the real estate in the Township of Haddon that

are intended to give the Company an overview of the ratable base.

A SUMMARY OF THE TOWNSHIP OF HADDON RATABLE BASE

The Township of Haddon is located in Camden County with an estimated population of 15,360 people according to the 2020 census estimate. The Township is primarily a residential community. The average residential assessment for 2022 was approximately \$ 232,657.

The Tax Assessor currently maintains data for approximately 5,447 line items (includes exempt properties)

CLASS	CLASSIFICATION	NO. LINE ITEMS
1	VACANT LAND	97
2	RESIDENTIAL	4727
ЗA	FARM (REGULAR)	0
3B	FARM (QUALIFIED)	0
4A	COMMERCIAL	271
4B	INDUSTRIAL	11
4C*	APARTMENT	15
15A-F	EXEMPT	326
	TOTAL LINE ITEMS	5447

The last revaluation of all real property in the Township of Haddon was as of October 1, 2010 for the 2011 tax year.

For the last several years, the number of sales, equalization ratios and general coefficient of deviation (COD) has been as follows: (The 2022 Equalization Ratio is 75.46%)

Year	Eq. Ratio	General COD	# of Sales
2022	75.46	13.41	263
2021	84.67	16.35	427
2020	87.21	13.43	317
2019	88.02	17.79	

2. Scope of Services

The Company agrees to prepare and execute a complete revaluation program of all real property within the confines of the Township of Haddon as illustrated on the Property Classification Schedule, attached as **Exhibit 12** of this RFP, for use by the Township Assessor in accordance with this RFP and the associated RFP documents, all of which are annexed hereto and which form a part of this RFP.

The Company agrees to provide services necessary to classify and appraise each parcel of real estate and each real property improvement which lies within the boundaries of the Township of Haddon at its fair market value according <u>N.J.S.A.</u> 54:4-1 *et seq.*, Standard 6 of the Uniform Standards of Professional Appraisal Practice and the State of New Jersey Administrative Code concerning the revaluation of all real property.

The Company shall prepare a separate list of tax-exempt properties indicating the full value of such property as if taxable.

The Company agrees to appraise all properties using the three (3) approaches to value (Sales Comparison, Replacement Cost and Income) where applicable and to use acceptable methods, forms and manuals authorized by the New Jersey Division of Taxation. The revaluation project <u>shall</u> be computer generated utilizing the BRT Power CAMA and Power Pad Imaging systems in accordance with the specifications as outlined in the contractual agreement and so stated elsewhere.

The Company shall send out Further Statements under the Township's letterhead and Tax Assessor's signature to all Exempt Properties (Class 15A, 15B, 15C, 15D, 15E and 15F). The Company shall request the Further Statement information by Certified Mail, return receipt requested. All printing and mailing costs for these statements shall be the Company's expense. The Company shall also prepare a separate list of tax-exempt properties indicating the full value of such property utilizing the three (3) approaches to value along a scaled sketch of the improvements as if taxable.

The Company shall acquaint the Township Assessor and staff, if any, in the use of procedures, standards and records used in determining the assessed values in order that the assessing office will be in a position to check the work as it progresses, and apply the same to new or altered properties as required subsequent the completion of the revaluation project.

The company shall provide a photograph of all properties including: front, rear and include any interior renovations such as kitchens and baths. Photos of exterior inground pools, cabanas and other outbuildings and amenities must also be included.

Work shall commence within thirty (30) days of the effective date of the award of the contract.

The contract shall be for a term of one year commencing upon issuance of a notice to proceed. The contract may be extended, subject to the requirements under the applicable law and Township Governing Body approval.

The revaluation field work must be completed by **August 30, 2024**.

The revaluation must be completed on or before by **November 1, 2024.**

E. Company's Key Staff who will be assigned to manage the revaluation

Resumes of all key staff that will have major productive roles and responsibilities in connection with the Township's revaluation must be submitted for review. Include the resumes of the project manager/principal-in-charge and other key staff identified in the detail organizational chart. The Company shall identify the project manager to be in charge of the revaluation within the proposal response.

The Township Assessor reserves the right and discretion to request a replacement project manager at any time in the interest of the Township of Haddon's obtaining the highest quality revaluation results. The Company shall provide a qualified replacement project manager that is acceptable to the Township Assessor within 5 days of written notice or be subject to a \$500.00 per day penalty for every day that a qualified and acceptable replacement project manager is not in place to manage the Township's revaluation project.

Compliance with Public Contracting and Campaign Finance Laws

The selection of Qualified Companies is subject to the provisions of the Local Public Contracts Law, <u>N.J.S.A.</u> 40A:11-1 *et seq.,* the provisions of "New Jersey Local Unit Pay-to- Play" Law,

<u>N.J.S.A.</u> 19:44A-20.4 *et seq.* The Township has structured a procurement process that seeks to obtain the desired results described above, while establishing a competitive process to assure that each person and/or firm is provided an equal opportunity to submit a sealed Proposal in response to this RFP. Responses to this RFP will be evaluated in accordance with the criteria set forth, which will be applied in the same manner to each response received.

The Company is advised of the responsibility to file an annual disclosure statement on political contributions with the New Jersey Enforcement Commission pursuant to <u>N.J.S.A.</u> 19:44A-20.13 (P.L. 2005, c.271, s.3), if the Company receives contracts in excess of \$50,000.00 from public entities in a calendar year. It is each Respondent's responsibility to determine if filing is necessary. Additional information on this requirement is available from ELEC at 888-313-3532 or at <u>www.elect.state.nj.us</u>

8. Proposal Format and Content

All communications concerning this RFP or the RFP process shall be directed to the Township's Clerk, in writing:

Township of Haddon 135 Haddon Avenue Haddon Twp., NJ 08108-2739

Attn: Dawn Pennock, Township Clerk

9. <u>Addenda</u>

Subsequent to issuance of this RFP, the Township (through the issuance of addenda to all firms that have received a copy of the RFP) may amend, modify, supplement or withdraw this RFP as otherwise deemed necessary or appropriate by and in the sole judgment of the Township.

During the period provided for the preparation of responses to the RFP, the Township may issue addenda, amendments or answers to written inquires. Those addenda will be noticed by the Township and will constitute a part of the RFP. All responses to the RFP shall be prepared with full consideration of the addenda issued prior to the proposal submission date.

The conditions and requirements are intended to be open and competitive for the purpose of obtaining adequate participation of interested parties, uniformity in the submission of proposals and selection of the most responsive proposal, not necessarily the lowest proposal. The Township shall be the sole judge of the merits of all proposals and sample materials submitted.

10. <u>Award</u>

The Township will select and approve a Company. The Township will further seek approval from the Township Governing Body, via adoption of a resolution, based upon the Township's assessment of which Company is most qualified and would best serve the interest of the Township.

The Township may or may not conduct negotiations with the Companies responding to this RFP. Therefore, the written proposal submitted should contain the Company's most favorable terms and conditions, since the selection and award may be without discussion with any of the Companies responding to this RFP.

11. Insurance and Bonding

The Company shall provide certificates of Liability and Workers' Compensation insurance providing coverage in accordance with the Township's insurance requirements. Insurance coverage shall indemnify and save harmless the Township of Haddon from any and all liability arising from the Company's work to be performed under the contract including attorneys' fees and costs in connection with the defense of any such claims.

The Company shall carry the following insurance for the complete duration in the performance of its services and shall provide certificates of insurance evidencing its coverage prior to starting work on the revaluation. The certificates of insurance shall provide for advance notice to the Township of any subsequent modification or

cancellation of the coverages.

Α.

- B. The Company shall provide Workers' Compensation Insurance with coverage as required by the State of New Jersey.
- C. The Company shall provide Comprehensive General Liability Insurance with a limit of not less than \$3,000,000 each occurrence and \$2,000,000 aggregate for bodily injury, personal injury and property damage.
- D. The Company shall provide Automobile Liability Insurance with a limit of not less than \$1,000,000 for automobile coverage per occurrence/claim.
- E. The Company shall provide Professional Liability Insurance of the type necessary to protect the Township from any professional liability arising under this Agreement. Said insurance shall be in an amount no less than \$2,000,000 for any one claim.
- F. The company shall provide Excess Umbrella Insurance in the amount of \$1,000,000 giving protection in excess of the General and Auto Liability coverage. The aforementioned policies shall name the Township of Haddon as an additional insured. A performance surety bond equal to the amount of this contract, executed by reputable bonding firm authorized to do business in the State of New Jersey shall be provided at contract execution. The surety bond shall be subject to a reduction of ten (10) percent of the contract amount upon acceptance of the completed revaluation by the Township Assessor. Said surety bond shall be subject to full cancellation at the conclusion of the second year of all appeals before the Camden County Board of Taxation. A treasury listed Bonding Company is to be provided with an AB Best rating. Copies of all insurance policies and the surety bond shall be provided to the Township of Haddon prior to the commencement of any work under the contract.

12. Affirmative Action

The Company is required to comply with the affirmative action requirements of P.L. 1975, c. 127, <u>N.J.S.A.</u> 10:5-31 *et seq.* (P.L. 1975, c. 127) as amended and supplemented and the rules and regulations promulgated pursuant thereto, and the provisions set forth in the State of New Jersey Equal Employment Opportunity Provisions for Professional Service Contracts and other Township of Haddon Ordinances pertaining to affirmative action.

13. <u>Termination of Agreement for Convenience</u>

The Township may terminate the Company's services under the contract in whole or in part for any reason at any time before completion. In that event, the Company shall be given notice by the Township of such termination specifying the effective date of same. Compensation shall be paid to the Company pursuant to the terms of the contract for the work actually performed prior to said date. No actions or claims for damages of any nature shall be brought against the Township in the event it exercises this right of termination.

14. Compliance with Federal, State and Local Law

The Company shall comply with all applicable laws, ordinances, and codes of the United States, the State of New Jersey and local governments within the State.

15. Indemnification

The Company agrees to defend, indemnify protect, and save harmless the Township and its subsidiaries and their boards, employees, agents and servants from and against any and all law suits, claims, demands or damages of whatsoever kind or nature but only to the extent they arise out of any act, error or omission, or failure to exercise such care as is customary in the profession by the Company, its agents, servants and employees in the performance of any and all services pursuant to this Agreement. Such indemnification shall include, but is not limited to, expenditures for and costs of investigations, hiring of expert witnesses, court costs, counsel fees, settlements, and judgments or otherwise.

The Company is an independent professional firm contracting with the Township to provide specialized services. The Company, its officers, partners, employees, agents, and servants are not to be deemed employees, agents or servants of the Township. The Company assumes full responsibility for liability arising out of their conduct whether by action or inaction. The Township assumes no liability or responsibility for the acts of the Company, its officers, partners, employees, agents or servants by virtue of entering into this Agreement.

16. <u>Conflict of Interest</u>

The Company shall submit a statement describing if they represent any property owner(s) as their appraisal expert in tax appeal matters against the Township and if any potential conflict of interest or appearance of impropriety, relating to other clients of the firm, or directors or employees of the Township, that could be created by providing services to the Township.

Indicate what procedures will be followed to detect and notify the Township and to resolve any conflicts of interests.

Indicate any pending litigation and/or regulatory action by any oversight body or entity that could have an adverse material impact on the Company's ability to serve the Township.

Indicate if the Company has ever had a prior contract with any governmental entity terminated for any reason or if payment is currently being withheld for any reason or your bond has not been released and provide a detailed explanation of same.

List all immediate relatives of the Principal(s) of the Company who are employees or elected officials for the Township of Haddon. For these purposes, "immediate relative" is defined as a spouse, parent, stepparent, brother, sister, child, stepchild, direct-line aunt or uncle, grandparent, grandchild, and in-laws by reason of relation.

No commissioner or employee of the Camden County Board of Taxation and no official or employee of the Township of Haddon shall have any interest whatsoever, directly or indirectly, as an officer, stockholder, employee or any other capacity in the Company.

The Company and its parent Company and subsidiaries, if any, shall not be retained as an expert appraiser/witness representing any property owner or taxpayer filing a tax appeal with respect to the revaluation completed by the Company for a period of five (5) years from the date of the expiration of the contract.

17. Litigation History

The Company shall list and describe in detail any current, ongoing, and completed litigation or threatened litigation or dispute the firm is experiencing or has experienced within the last ten (10) years.

The Company shall include with its Proposal, a list of municipalities where a

revaluation or reassessment was completed in the last ten (10) years. The list should clearly identify between revaluation and reassessment programs. For each revaluation, the Company should also list the general coefficient of deviation in the year following the revaluation.

18. Confidential Nature of Project

Disclosure of any appraisal information or potential tax impact information to any individual, firm, or corporation, other than the Township Assessor or their authorized representative is expressly prohibited, and if done before conclusion of the project will be considered a violation of the contract. It is understood that this does not refer to information released under due process of law and the Open Public Records Act (OPRA) of the State of New Jersey or information discussed in connection with the informal taxpayer review hearings.

APPENDIX A

Acknowledgement of Required Documents Submitted

Checklist for Items that will be required (Place an X next to each item submitted)

1	Executed Letter of Qualification	
2	Executed Letter of Intent	
3	Executed "Disclosure Statement"	
4	Mandatory Affirmative Action Language	
5	Mandatory Language: American Disabilities Act	
6	Business Registration Certificate (BRC) from the State of New Jersey Department of Treasury, Division of Revenue	
7	Non-Collusion Affidavit (properly notarized)	
8	Required Insurance Documentation	
9	Pay-to-Play Annual Disclosure Statement	
10	Executed "Conflict of Interest Certificate"	
11	Executed "Company's Disclosure Form and Certification"	
12	Acknowledgment of Receipt of Addendum, if applicable	

Signature: The undersigned hereby acknowledges and will submit the above listed requirements, except insurance, at the time the proposal is officially received. A certificate of insurance must be submitted prior to execution of contract.

Name of Respondent/Company: _____

Print Name and Title: _____

Signature: _____

Date: _____

EXHIBIT 1 LETTER OF QUALIFICATIONS

(Note: To be typed on Company's letterhead. No modifications may be made to this letter)

[Insert date]

Township Clerk Township of Haddon 135 Haddon Avenue Haddon Township, NJ 08108-2739

Dear :

The undersigned has reviewed our Qualification Statement submitted in response to the Request for Proposal (RFP) issued by the Township of Haddon, dated [insert date], in connection with the Township's need for professional services to prepared and execute a complete program for the revaluation of all real property located in the Township of Haddon, for the project entitled "Revaluation Of All Real Property."

We affirm that the contents of our Qualification Statement (which Qualification is incorporated herein by reference) are accurate, factual and complete to the best of our knowledge and belief and that the Qualification Statement is submitted in good faith upon express understanding that any false statement may result in the disqualification of (Your Company Name).

(Company shall sign and complete the spaces provided below. If a joint venture, appropriate officers of each Company shall sign.)

(Signature of Chief Executive Officer)

(Type Name and Title)

(Type Name of Firm)

Dated:

 If a joint venture, partnership or other formal organization is submitting a Qualification Statement, each participant shall execute this Letter of Qualification.

EXHIBIT 2 LETTER OF INTENT

(Note: To be typed on Company's Letterhead. No modifications may be made to this letter)

[Insert date]

Township Clerk Township of Haddon 135 Haddon Avenue Haddon Township, NJ 08108-2739

Dear:

The undersigned, as Company, has (have) submitted the attached Proposal in response to a Request for Proposal (RFP), issued by the Township of Haddon's ("Township"), dated [insert date], in connection with the Township's need for professional services to prepare an execute a complete program for the revaluation of all real property located in the Township of Haddon, for the project entitled "Revaluation Of All Real Property."

[Insert Company Name] HEREBY STATES:

- 1. The Qualification Statement contains true accurate, factual and complete information.
- 2. [Insert Company Name] agrees (agree) to participate in good faith in the procurement process as described in the RFP and to adhere to the Township's procurement schedule.
- 3. [Insert Company Name] acknowledges that all costs incurred by it (them) in connection with the preparation and submission of the Proposal submitted in response to the RFP, or any negotiation which results there from shall be exclusively the sole responsibility of the Company.
- 4. [insert Company Name] hereby declares (declare) that the only persons participating in this Proposal as Principals are named herein and that no person other than those mentioned has any participation in this proposal or in any contract to be entered into with respect thereto. Additional persons may be subsequently included as participating Principals, but only if acceptable to the Township.
- 5. [insert Company Name] declares that this Proposal is made without connection with any other person, firm or parties who has submitted a Proposal, except as expressly set forth below and that it has been prepared and has been submitted in good faith and without collusion or fraud.
- 6. [Insert Company Name] acknowledges and agrees that the Township may amend, modify, or withdraw this RFP (in its sole judgment). In any case, the Township shall not have any liability to the Company for any costs incurred by the Company with respect to the procurement activities described in this RFP.
- 7. [Insert Company Name] acknowledges that any contract executed with respect to the provision of [insert services] must comply with all applicable affirmative action and similar laws. Company hereby agrees to take such actions

as are required in order to comply with such applicable laws.

(Company shall sign and complete the space provided below. If a joint venture, appropriate officers of each Company shall sign.)

(Signature of Chief Executive Officer)

(Type Name and Title)

(Type Name of Firm)

Dated:

 If a joint venture, partnership or other formal organization is submitting a Qualification Statement, each participant shall execute this Letter of Qualification.

DISCLOSURE STATEMENT

DISCLOSURE STATEMENT

RESPONDANT MUST SPECIFY WHETHER RESPONDING AS AN INDIVIDUAL, PARTNERSHIP OR CORPORATION AND FILL IN THE APPROPRIATE SECTION SHOWN HEREIN.

N.J. STATE STATUE REQUIRES ANY CORPORATION AND PARTNERSHIP SUBMITTING A PROPOSAL FOR A MUNICIPAL CONTRACT TO SUBMIT A LIST OF THE NAMES AND ADDRESS OF ALL STOCKHOLDERS OWNING 10% OR MORE OF THE STOCK OF THE CORPORATION OR IN THE CASE OF A PARTNERSHIP, THE NAME AND ADDRESSES OF THOSE OWNING A 10% OR GREATER INTEREST THEREIN:

INDIVIDUAL: (IF AN INDIVIDUAL FILL IN THE FOLLOWING)

TRADING	1e of Individua				AS:
				FID#:	
T/A:			FID#	:	
	ULL NAME OF EA				
				FID#:	
FULL	NAME	OF	OFFICER	SIGNING	PROPOSAL:
TITLE	OF	OFFIC	CER	SIGNING	PROPOSAL:
NAME OF	STATE IN WHICH	I COMPANY IS	INCORPORATE	ED:	
NAME AN	D ADDRESS OF E	EACH STOCKHO		G 10% OR MORE OF	THE CORP. STOC

NOTE: NO POST OFFICE BOX NUMBER WILL BE ACCEPTED, FULL STREET ADDRESS ONLY.

CRIMINIAL CONVICTION TO SERVE AS GROUNDS FOR DISQUALIFICATION FROM AWARD OF CONTRACT:

Vendor must disclose whether any person(s) named above have a criminal conviction in any Municipal, County, State or Federal Court, in this State or any other State. Yes [] No []

Any rejection by the Township, based upon a prior conviction, shall not take place unless and until there has been a responsibility hearing held by the Township. Also, the respondent must report any conviction of any person(s) named above in any Municipal, County, State or Federal Court, in this State or any other State during the contract or agreement period to the Corporation Counsel of the Township.

Any termination by the Township, based upon a subsequent conviction, shall not take place unless and until there has been a responsibility hearing by the Township.

Signature and Title

AFFIX CORPORATE SEAL HERE

P.L. 1975, C. 127, (<u>N.J.S.A.</u> 10:5-31) MANDATORY AFFIRMATIVE ACTION LANGUAGE: PROCUREMENT, PROFESSIONAL AND SERVICE CONTRACTS

During the performance of this contract, the Vendor agrees as follows:

The Company or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identify or expression, disability, nationality or sex. Except with respect to affectional or sexual orientation and gender identity or expression, the Company will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, affectional or sexual orientation, gender identity or expression, disability, nationality or sex. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Company agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this nondiscrimination clause;

The Company or subcontractor or subcontractor, where applicable will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, affectional or sexual orientation, gender identity or expression, disability, nationality or sex;

The Company or subcontractor, where applicable, will send to each labor union or representative or workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or workers' representative of the contractor's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment;

The Company or subcontractor, where applicable, agrees to comply with the regulations promulgated by the Treasurer pursuant to P.L. 1975, C. 127, as amended and supplemented from time to time and the Americans with Disabilities Act;

The Company or subcontractor agrees to make good faith efforts to employ minority and female workers consistent with the applicable county employment goals prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C. 127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C. 127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C. 127, as amended and supplemented from time to time;

The Company or subcontractor agrees to inform in writing appropriate recruitment agencies including, but not limited to, employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, race, creed, color, national origin, ancestry, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The Company or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job -related testing, as established by the statutes and court decisions of the State of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

In conforming with the applicable employment goals, the Company or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and layoff to ensure that all such actions are taken without regard to age, race, creed, color, national origin, ancestry, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, consistent with the statutes and court decision of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

In accordance with Public Law 1975, C. 127, (N.J.S.A. 10:5-31) The successful

Company shall submit to the Township, after notification or award but prior to execution of the revaluation contract, one (1) of the following three (3) documents:

- 1. Letter of Federal Affirmative Action Plan Approval
- 2. Certificate of Employee Information Report
- 3. Employee Information Report Form AA302

Affirmative Action evidence must be submitted within seven (7) days after receipt of notification of intent to award the contract or receipt of the contract, whichever is sooner.

The Company's proposal must be rejected as non-responsive if the Company fails to Submit (1), (2) or (3) above, within the time specified after the Township submits the contract to the Company for signing.

The Company and its subcontractor shall furnish such reports or other documents to the Division of Contract Compliance and EEO as may be requested by the Division from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Division of Contract Compliance and EEO for conducting a compliance investigation pursuant to <u>Subchapter 10 of the Administrative Code (N.J.A.C. 17:27)</u>.

AMERICANS WITH DISABILITY ACT OF 1990 EQUAL OPPORTUNITY FOR INDIVIDUALS WITH DISABILITY

The Company and the Township of Haddon (herein referred to as the "TOWNSHIP") do hereby agree that the provisions of Title 11 of the Americans With Disabilities Act of 1990 (the "Act") (42 U.S.C. S12101 et seq.), which prohibits discrimination on the basis of disability by public entities in all services, programs, and activities provided or made available by public entities, and the rules and regulations promulgated pursuant thereunto, are made a part of this contract. In providing any aid, benefit, or service on behalf of the Township pursuant to this contract, the Company agrees that the performance shall be in strict compliance with this Act. In the event the Company, its agents, servants, employees, or subcontractors violate or are alleged to have violated the Act during the performance of this contract, the Company shall defend the Township in any action or administrative proceeding commenced pursuant this Act. The Company shall indemnify, protect, and save harmless the Township, its agents, servants, and employees from and against any and all suits, claims, losses, demands, or damages of whatever kind of nature arising out of or claimed to arise out of the alleged legal violation. The Company shall, at its own expense, appear, defend, and pay any and, all charges for legal services and any and all costs and other expenses arising from such action or administrative proceeding or incurred in connection therewith. In any and all complaints brought pursuant to the Municipal's grievance procedure; the Company agrees to abide any decision of the Township, which is rendered pursuant to, said grievance procedure. If any action or administrative proceeding results in an award of damages against the Township or if the Township incurs any expense to cure a violation of the ADA which has been brought pursuant to its grievance procedure, the Company shall satisfy and discharge the same at its own expense.

The Township shall, as soon as practicable after a claim has been made against it, give written notice thereof to the Company along with full and complete details of the claim. If any action or administrative proceeding is brought against the Township or any of its agents, servants, and employees, the Township shall expeditiously forward or have forwarded to the Company every demand, complaint, notice, summons, pleading, or other process received by the Township or its representatives.

It is expressly agreed and understood that any approval by the Township of the services provided by the Company pursuant to this contract will not relieve the Company of the obligation to comply with the Act and to defend, indemnify, protect, and save harmless the Township pursuant to this paragraph. It is further agreed and understood that the Township assumes no obligation to indemnify or save harmless the Company, it agents, servants, employees and subcontractors for any claim which may arise out of their performance of this Agreement.

Furthermore, the Company expressly understands and agrees that the provisions of this indemnification clause shall in no way limit the Company's obligation assumed in this Agreement, nor shall they be construed to relieve the Company from any liability, nor preclude the Township from taking any other actions available to it under any other provisions of the Agreement or otherwise at law.

NEW JERSEY BUSINESS REGISTRATION REQUIREMENTS

The Company must include proof of its own business registration and proofs of business registration of those subcontractors, if applicable, required to be listed in the Company's submission (i.e., "named subcontractors"). The proof of business registration shall be provided at the time the proposal is officially received and opened by the Township.

The Company shall provide written notice to its subcontractors of the responsibility to submit proof of business registration to the Company.

Before final payment on the contract is made by the contracting agency, the Company shall submit an accurate list and the proof of business registration of each subcontractor or supplier used in the fulfillment of the contract, or shall attest that no subcontractors were used.

For the term of the contract, the Company and each of its affiliates and subcontractors and each their affiliates [N.J.S.A. 52:32-44(g)(3)] shall collect and remit to the Director of the New Jersey Division of Taxation, the use tax due pursuant to the Sales and Use Tax Act on all sales of tangible personal property delivered into this State, regardless of whether the tangible personal property is intended for a contract with the contracting agency.

A business organization that fails to provide a copy of a business registration as required pursuant to section 1 of P.L. 2001, c. 134 (C. 52:32-44 et al.) or subsection e. or f. of section 92 of P.L. 1977, c. 110 (C.5:12-92), or that provides false business registration information under the requirements of either of those sections, shall be liable for a penalty of \$100 for each day of violation, not to exceed \$50,000 for each business registration copy not properly provided under a contract with a contracting agency.

My Commission Expires:_____, 202

EXHIBIT 7 NON-COLLUSION AFFIDAVIT

STATE OF NEW JERSEY:

SS:_____

COUNTY OF CAMDEN:

I, ______ of the Township of Haddon in the County of Camden and the State of New Jersey, of full age, being duly sworn according to law on my oath depose and say that:

I am______of the firm of______the Company making the Proposal for the above named project, and that I executed the said Proposal with full authority to do so; that said Company has not, directly or indirectly, entered into an agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive Company in connection with the above named project; and that all statements contained in said Proposal and in this affidavit are ______relies

upon the truth of the statements contained in said Proposal and in the statements contained in this affidavit in awarding the contract for said project.

I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon agreement or understanding for a commission, percentage, brokerage, or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by

(Name of Company)

Subscribed and sworn to before me this _____ day of _____, 2023

Notary Public, State of _____

My Commission expires _____

Signature: _____

Ву: _____

INSURANCE and BONDING REQUIREMENTS and ACKNOWLEDGEMENT FORM

Certificate(s) of Insurance and bond shall be filed with the Township Clerk's Office upon award of the contract by the Governing Body.

The minimum amount of insurance to be carried by the Company shall be as follows:

MINIMUM LIMITS OF INSURANCE COVERAGE

1. The Company shall provide Workers' Compensation Insurance with coverage as required by the laws of the State of New Jersey.

2. The Company shall provide Comprehensive General Liability Insurance with a limit of not less than \$3,000,000 each occurrence and \$2,000,000 aggregate for bodily injury, personal injury and property damage.

3. The Company shall provide Automobile Liability Insurance with a limit of not less than \$1,000,000 for automobile coverage per occurrence/claim

4. The Company shall provide Professional Liability Insurance of the type necessary to protect the Municipal from any professional liability arising under this Revaluation Contract with the Township of Haddon. Said insurance amount shall be a minimum of \$2,000,000 for any one claim.

5. The Company shall provide Excess Umbrella Insurance Coverage in the amount of \$1,000,000 giving protection in excess of the General and Auto Liability coverage.

A performance surety bond equal to the amount of this contract, executed by a reputable bonding firm authorized to do business in the State of New Jersey shall be provided. The surety bond shall be subject to a reduction of ten (10%) percent of the contract amount upon acceptance of the completed revaluation by the Township Assessor. Said surety bond shall be subject to full cancellation upon completion of the second year of appeals before the Camden County Board of Taxation.

A treasury listed Bonding Company is to be provided with an AB Best rating.

Copies of the insurance policies and surety bond shall be provided to the Township of Haddon prior to the commencement of any work under this contract.

The certificate(s) of insurance must cover the contract period and name the Township of Haddon as an "additional insured."

Acknowledge of Insurance Requirements:

Signature

Date

Print Name and Title

"P AY-TO-P LAY" ANNUAL DIS CLOS URE S T AT E ME NT

In accordance with <u>N.J.S.A.</u> 19:44A-20.26, 20.27, a business entity that has received \$50,000 or more through government contracts in a calendar year must file an annual disclosure statement electronically with the Election Law Enforcement Commission (ELEC) to report contract information and reportable contributions it has made. Failure to submit a copy of your annual disclosure statement and proof of submission to ELEC is considered a mandatory disqualification of their proposal.

CONFLICT OF INTEREST CERTIFICATE

Pursuant to item #16 incorporated in these Proposal Specification, the Company shall submit a statement and certification detailing and describing any conflict of interest as outlined therein.

IN WITNESS WHEREOF, the undersigned Has caused this Certificate to be executed

This ______ day of ______, 2023

Signature

Print Name and Title

Company Statement and Certification of Litigation and Disputes

Please describe accurately and in complete detail the following:

Please state whether any of the following issues and/or events has occurred in the last ten (10) years with respect to said Company (as its current entity or as a predecessor entity). If the answer is "yes" to any of the following please explain the following in full detail.

- A. Whether the Company was subject of any claim, settlement, order, judgment or decree.
- B. Whether the Company was the subject of any civil or criminal proceeding in which there was a final adjudication adverse to the Company and/or other parties.
- C. Whether a petition under bankruptcy, insolvency or receivership was filed by or against said Company.
- D. Whether the Company has:
 - a. Were awarded a contract and your contract was terminated;
 - b. Were awarded a contract in which your contract was temporarily discontinued which directly arose from activities conducted by the Company;
 - c. Were awarded a contract that subsequently resulted in your Company receiving a fine, refund of monies paid it or has their surety bond frozen which directly arose from services your Company was hired to perform;
 - d. Were awarded a contract and have not delivered all the services or provided all the deliverables and in current dispute with the other party over a contract awarded your Company.

Failure to provide the required Disclosure Certification, submit officially signed a notarized documents or response to any and all information requested/required by the Township will result in the proposal response being disqualified as non-responsive.

Under penalty of perjury, I declare that I have examined the Request for Proposal, the Company provided proposal and the Litigation and Dispute Disclosure form hereto, to the best of my knowledge and belief and all statements contained hereto are true, accurate and complete.

On this	day of	, 20
Company:		
Signature:		
Print Name and Title		
Subscribed and sworn to b	pefore me thisday of	, 2023
	Notary Public, State of	of

My Commission expires	

Signature:

Ву: _____

EXHIBIT 12 Township of Haddon DISTRICT WIDE REVALUATION OF ALL REAL PROPERTY <u>PROPERTY CLASSIFICATION SCHEDULE</u>

As of February 8th, 2023 the Township's MOD_IV data indicated the following breakdown of properties:

Property Class	# of Line Items
1	97
2	4,727
3A	0
3B	0
4A	271
4B	11
4C	15
15A	14
15B	0
15C	236
15D	15
15E	1
15F	60