

DEPARTMENTAL INPUT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

Rev 1

New contract
 OTR
 CO
 SS
 BY
 Emergency

Previous Contract/Project No. FBW/923-07/1

Re-Bid
 Other

LIVING WAGE APPLIES: YES NO

Requisition/Project No: EPP-RFO793 TERM OF CONTRACT: years with one-year options-to-renew

Requisition/Project Title: Utility Valuation Consultant

Description: Consultant to assist the Miami-Dade County Office of the Property Appraiser in the preparation of the annual valuation assessments for major utility companies.

User Department(s): Office of the Property Appraiser Contact Person: Pearl P. Bethel Phone: (305) 375-2102

Issuing Department: DPM Funding Source: General Fund REVENUE GENERATING: No

ANALYSIS

Commodity/Service No: 918-14 and 918-97 SIC: _____

Trade/Commodity/Service Opportunities

Contract/Project History of Previous Purchases For Previous Three (3) Years
 Check Here if this is a New Contract/Purchase with no Previous History

EXISTING 2ND YEAR 3RD YEAR

Contractor: _____

Small Business Enterprise: _____

Contract Value: _____

Comments: _____

Continued on another page (s): Yes No

RECOMMENDATIONS

SBE	Set-Aside	Sub-Contractor Goal	Bid Preference	Selection Factor
		%		
		%		
		%		
		%		

Basis of Recommendation: _____

RECEIVED
 DEPT. BUSINESS DEV.
 2011 JUL 12 AM 9:08

Porter, Albert (SBD)

From: Bethel, Pearl (DPM)
Sent: Wednesday, July 13, 2011 12:05 PM
To: Porter, Albert (SBD)
Subject: Emailing: SBE_Ordinance
Attachments: SBE_Ordinance.pdf

Do you want the attached or the below language?

Selection Factor

This Solicitation includes a selection factor for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows. A SBE/Micro Business Enterprise is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's proposal. An SBE/Micro Business Enterprise must be certified by the Department of Small Business Development for the type of goods and/or services the Proposer provides in accordance with the applicable Commodity Code(s) for this Solicitation. For certification information contact the Department of Small Business Development at (305) 375-2378 or access www.miamidade.gov/sba. The SBE/Micro Business Enterprise must be certified by proposal submission deadline, at contract award, and for the duration of the contract to remain eligible for the preference. Firms that graduate from the SBE program during the contract may remain on the contract.

Pearl

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This is not an advertisement.

Miami-Dade County, Florida

EPP-RFO No. 793

SCOPE OF SERVICES

2.1 Introduction/Background

The Property Appraiser is a Constitutional Officer of the State of Florida charged with determining the value of all property within the County for tax purposes, maintaining certain records connected therewith, granting exemptions, and satisfying all related statutory requirements, while establishing the correct values for County properties.

The County Office of the Property Appraiser (OPA) is responsible for administering the County's ad valorem tax valuation system in accordance with Florida law. OPA's mission is to help enhance the quality of life in our community by delivering excellent public service. The primary task of the OPA is the identification and annual appraisal of all real and certain types of tangible personal property located in the County. Other tasks performed by OPA for the annual assessment value roll are:

- Inventory the quantity, quality and important characteristics of each property located and identified.
- Estimate the market value of each property located and identified.
- Calculate the assessed value of each property when applicable.
- Calculate the taxable value of each property after application of all qualified exemptions to the assessment value roll.
- Prepare and certify the assessment value rolls to all taxing authorities.
- Notify owners of their proposed property values and taxes.
- Defend values and exemption denials when appealed by property owners.

The County is seeking a qualified firm to assist the OPA in the preparation of annual utility valuation assessments.

2.2 Requirements

A. Minimum Requirements

The minimum requirements for this Solicitation are that the selected Proposer:

- a) Or the selected Proposer's Project Manager must possess or be a member of one or more of the following: a) Certified Assessment Evaluator (CAE) from the International Association of Assessing Officers, b) American Society of Appraisers or c) the Appraisal Institute.
- b) Must have at a minimum a Bachelors degree in Business, Economics, Finance, Real Estate or related field.
- c) Must have thorough knowledge of Florida Statutes, Florida Administrative Code and Florida Department of Revenue guidelines, as well as governing case law regarding property appraisal, tangible personal property, property assessment and assessment compliance in the State of Florida.

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- d) Must have at least ten years of intensive experience in valuation of all types of utility companies, such as electrics, electric cooperatives, local and long distance communication companies, cellular companies and gas pipeline companies, for several counties in the State of Florida.
- e) Must have been an expert witness through testimony in court cases and Value Adjustment Board proceedings within the last five years.

B. Preferred Requirements

The preferred qualification requirements for this Solicitation are:

- A. The selected Proposer should have:
 - i. Experience in preparing utility valuation reports; and
 - ii. Experience interacting with utility tax managers, county property appraisers and department heads, Florida Department of Revenue personnel and consulting firms hired as agents by the utility companies.
- B. The selected Proposer's key personnel, who will perform the work or services:
 - i. Should include staff with the knowledge of utility appraisal practices, utility accounting practices and procedures;
 - ii. Should include staff adept at utilizing various computer spreadsheets, graphs and word processing programs;
 - iii. Should be able to exercise sound judgment, use uniform processes and operate without bias when preparing utility valuations; and
 - iv. Should be immediately available following contract execution.

2.3 Required Tasks and Deliverables

This Scope of Services describes the performance requirements for which the selected Proposer will be enlisted to provide "Utility Valuation for Assessment Purposes" for the OPA.

Tasks:

The selected Proposer shall:

- A. Review Tangible Personal property Tax Returns from Florida Gas Transmission Company, Bellsouth Telecommunications, Inc., Florida Power & Light Company, FPL FiberNet, LLC, Florida City Gas and Tampa Electric Company d/b/a Peoples Gas System.
- B. Research and prepare work papers, reports, schedules, exhibits and valuation reports using various financial statements (annual reports, 10Ks, Federal Energy Regulatory Commission reports, etc.) of these utilities.
- C. Develop a legal, defensible, fair market value assessment of all tangible personal property owned by these utilities throughout Miami-Dade County as of January 1st of each year in accordance with Florida Statutes, Florida Department of Revenue guidelines and Florida case law.

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- D. Consult with other counties regarding their analysis and assessments on these same utilities in their counties.
- E. Determine and advise the OPA of the appropriate tangible personal property values (including total value, taxable value, pollution control equipment value, exemption value, supplies value, etc., as applicable) for the various utilities as of the annual assessment date.
- F. Submit to the OPA all reports, work papers, schedules, and exhibits, etc., which pertain to the annual valuation of the utilities tangible personal property.
- G. Be available, with advance notice, to meet with OPA management and staff, as well as utility company management, staff and representatives.
- H. Assist, represent and defend the OPA in any meetings or negotiations with regard to the annual valuations of the utility company indicated above.
- I. Assist, represent and defend the OPA at any Value Adjustment Board (VAB) hearings with regard to the annual valuations of the utility mentioned above.

Note: All services performed, including review of tangible personal property tax returns, shall be under the supervision of the OPA and the information contained on any tangible personal property tax return or any information obtained by the OPA as authorized by law, including specifically that obtained as authorized by Florida Statute, Section 195.027, shall be and remain confidential as required by Florida Statute, Section 193.074 and no such information shall be disclosed to anyone or any entity except as expressly permitted by law.

Deliverables

The selected Proposer shall:

Provide the complete and final annual valuation to the OPA no later than June 1st of each year, prior to the first certified tax roll.

Note: Final annual valuation deadline of June 1st of each year may occur as little as two weeks after receiving the required tangible personal property tax return, should the taxpayer be granted full extension limitations, or as much as eight weeks if no extension was requested.