

# EXHIBIT B

(MTS' PROPOSAL TO CITY OF STAMFORD RFP NO. 739A (SECOND REQUEST))

# *Municipal Tax Services LLC*

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May 24, 2018

City of Stamford  
Purchasing Department  
888 Washington Boulevard  
Stamford, Connecticut 06901

Attention:  
Mr. Erik Larson  
Purchasing Agent

Dear Mr. Larson,

Municipal Tax Services LLC ("MTS") is pleased to submit this proposal to identify motor vehicles not properly registered in the City of Stamford ("Stamford" or "City") in response to the City's Request for Response dated April 24, 2018 ("RFP"). We are excited about this opportunity to service Stamford and are prepared to provide our top resources, our highest degree of professionalism and the dedication and commitment you deserve.

We have carefully read through the RFP and it is clear you are seeking a service provider who possesses three specific qualifications:

- (1) Experience and expertise in regard to providing the types of or similar services outlined in the Scope of Services in the RFP;
- (2) A proven track record in providing these types of similar services for municipal governments; and
- (3) Knowledge of the laws and regulations governing the services outlined in the Scope of Services.

As you read our proposal we are confident you will agree that MTS satisfies each of your requirements and is the firm best qualified for this assignment.

MTS will distinguish its service to Stamford by providing responsiveness and value that will exceed your expectations. We believe choosing MTS makes business sense for several reasons as outlined in the remainder of this letter:

- We have the right team to meet your needs.

- Our technology continues to be state of the art with inherent efficiencies that will allow us to maximize the benefit the City realizes.
- We will emphasize communication with the Office of the City Assessor to ensure that all of Stamford's expectations are met and that MTS provides the most value to the City.

### **The Right Team To Meet Your Needs**

By choosing MTS you will enjoy a team of professionals with a proven record of serving cities like Stamford throughout Connecticut. I will serve as the City's lead contact. As the Managing Member of MTS you have my commitment that we will deliver the highest quality service to Stamford. I have over 48 years of investigative experience and have devoted the last 21 years to investigations directly related to motor vehicle assessments. *I am a licensed private investigator in the State of Connecticut, which is required by state statute, to perform the services Stamford is seeking.* I have worked closely with tax assessors throughout the state and have been called upon to provide testimony with respect to motor vehicle tax assessment cases.

The staff of MTS has experience in working with existing laws pertinent to the assessment of taxes relating to motor vehicles. We are committed to the training of our staff as new statutory provisions are put in place or new legislation is enacted. Our field agents are responsible and professional and work well with local law enforcement officials when the need arises.

### **Technology and Maximizing Benefit**

Our process of identifying potential taxpayers and acquiring the necessary information to pursue assessment of their motor vehicle(s) increases the speed at which we function, enhances the degree of accuracy of our investigation and significantly increases the capacity of information we can process in a short period of time. This will allow Stamford to continue to realize the maximum benefit possible during the contract term.

Our field agents acquire data utilizing the patented Securewatch24 system utilizing AutoVu™ and also through physical observation and voice recorded information. The AutoVu™ reads are uploaded into our system electronically and the voice recorded information is entered by the agent who acquired the data thus reducing the possibility of errors. Once entered, the data is processed through our secured data management system. This system was developed by MTS for the purpose of expediting the processing of the information gathered during our investigation. The process efficiencies we have perfected allow us to deliver the information needed to issue tax assessments resulting from our service at an increased volume in a shorter amount of time. For example, during our contract terms in various municipalities we have identified over 38,000 vehicles representing over 62,000 tax years with a net assessed value of over \$425 million.

## **Communication**

MTS's program has been designed to assist the individual assessor and is tailored to meet his/her specific criterion. We understand that individual assessors have different philosophies in how they apply the law. We will meet with city officials to assess the progress of the program and can provide up to date statistics at any point in time. We are committed to working with your assessor and evoking his application of the law regarding the assessment of property tax on motor vehicles. We will work with him to keep the most effective program in place for Stamford.

MTS offers the highest degree of energy, commitment and knowledge needed to fulfill our promise of superior service. We want your business. I believe the opportunity to serve Stamford will be both professionally challenging and personally rewarding. I assure you that MTS is committed to meet and exceed your service expectations.

The proposal put forth is a firm and reasonable offer. The offer proposed herein, is similar to that which exists in other contracted municipalities.

Thank you for the opportunity to serve Stamford.

Very truly yours,

**Carl M. DeProfio**  
Managing Member

**Enclosure:      1 Original Proposal (paper)**  
**6 Copies of Proposal (paper)**  
**2 Electronic copies of Proposal (USB)**

# PROPOSAL

IN RESPONSE TO REQUEST FOR PROPOSALS No739a (SECOND REQUEST)

ENTITLED:

MOTOR VEHICLE TAX COMPLIANCE

Submitted By: Carl M. DeProfio, Managing Member  
Municipal Tax Services LLC  
PO Box 2254  
Huntington, Connecticut 06484-1254  
Telephone - 866-703-0780  
May 24, 2018

*Municipal Tax Services LLC*

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## **Background and Proposer Information**

1. Municipal Tax Services LLC ("MTS") was formed on July 14, 2005. Since our inception, we have focused all of our efforts on working with Connecticut municipalities by investigating vehicles which are not included in their respective Motor Vehicle Grand Lists. Carl M. DeProfio is the founder and managing member of MTS. He has devoted the last 21 years of his career providing this service to Connecticut municipalities. Mr. DeProfio established MTS with the purpose of providing local governments with the experience and resources necessary to conduct specialized investigations as they relate to the assessment of motor vehicles and other personal property.

Mr. DeProfio manages the daily operations of MTS. He will be Stamford's primary contact and will be responsible for MTS's obligations under any contract awarded to MTS by the City. He is a graduate of Sacred Heart University and holds a Bachelor of Arts Degree in Sociology. Mr. DeProfio has over 48 years of experience as an investigator. He is a retired Detective of the Connecticut State Police where he served in various investigative capacities over a 22 year career. Since his retirement in 1992 he has headed his own private investigation agency and so possesses a Private Detective Corporation license. Mr. DeProfio has devoted the last 21 years of his career to investigations relative to tax assessment matters directly related to motor vehicle assessments.

2. MTS is a local firm serving municipalities in the State of Connecticut. MTS offices are located in Shelton, Connecticut
3. The address of MTS is: 120 Long Hill Cross Road Suite 3  
Shelton, Connecticut 06484
4. MTS has never been the subject of any professional disciplinary action by any federal or state government or by any professional organization.
5. MTS has provided the same services as outlined in Stamford's Request for Proposal No. 739a to the following Connecticut Municipalities:

Bridgeport  
Danbury  
Hamden  
Hartford (currently under contract)  
New Haven  
North Haven  
Stratford  
West Haven  
Waterbury (currently under contract)

6. The particulars regarding the office that would handle the City of Stamford's engagement are as follows:

**Municipal Tax Services**  
120 Long Hill Cross Road Suite 3  
Shelton, Connecticut 06484  
Phone: (203) 402-0780  
Fax: (203) 402-0784

Mr. DeProfio manages the daily operations of MTS. He will be Stamford's primary contact and will be responsible for MTS's obligations under any contract awarded to it by the City. The total number of professional staff employed by MTS either as employees or contracted individuals is ten (10).

Primarily Carl M. DeProfio and Andrew Schilkowski would be available throughout the year to meet with City Officials as may be required. Any of our full time employees would be available for consultation regarding any case initiated by MTS.

7. MTS engages only with Municipalities in the State of Connecticut. Those municipalities are enumerated in (5) above. MTS has been providing our specialized service to Connecticut Municipalities for the past thirteen (13) years.
8. In addition to Carl M. DeProfio, Carl R. DeProfio is also a Member.

Carl R. DeProfio is a minority member of MTS. He is a licensed CPA in Connecticut. He earned his Bachelor of Science Degree in Accounting from Southern Connecticut State University and his Master of Science Degree in taxation from the University of New Haven. Mr. DeProfio manages the finances of MTS. He is responsible for ensuring that MTS is in compliance with all federal, state, and local tax laws.

Either of the principal members of MTS are authorized to bind the organization in negotiations with the City of Stamford.

All inquiries concerning this proposal should be addressed to Carl M. DeProfio whose contact information is listed above.

MTS is committed to provide Stamford with high quality personnel who have the ability to process the data that is acquired, make informed decisions regarding that data, have the knowledge and ability to articulate the applicable laws and intelligently respond to questions from potential taxpayers or their legal representatives. In addition to the principal members, MTS currently maintains 4 contracted professionals who are experts in their respective fields. We also employ four (4) full time agents and two (2) part time employees to do just that. Of those ten, two are females and one is Hispanic. As a company, MTS is committed to Affirmative Action policies.



Our computer technology and data management team is comprised of two individuals and our field agent and office staff consists of eight. They are as follows:

*Our computer technology and data management team:*

Steven Posick

Mr. Posick is our network and systems security consultant. Mr. Posick has been under contract with our firm since its inception. He attended the University of New Haven and is the architect of our network and systems security structure. Mr. Posick is a Broadcast Media Engineer and Associate Director, Production Workflow Applications for an internationally renowned Broadcast Media Corporation. He possesses the unique and highly coveted CISSP (Computer Information Security Systems Professional) designation. He has assisted Federal Law enforcement officials in Homeland Security issues.

Andrew Schilkowski

Mr. Schilkowski is a full time employee and our Office Manager. He joined MTS on August 1, 2005 as our Information Technology Specialist and Data Manager. He is responsible for maintaining our information technology system and the processing of all electronic data. He has created our data preservation system to ensure no data can be lost or destroyed under any circumstances. He has developed and written computer programs to enhance MTS's system analyses of data and has worked closely with the IT departments in the respective municipalities to comply with the specific criteria akin to their tax management systems. Mr. Schilkowski has become proficient in his knowledge and understanding of the property tax laws relating to motor vehicle assessment and taxation. He knowledgably interacts with tax assessors, taxpayers, their legal representatives and other municipal officials while servicing municipal contracts awarded to MTS. This knowledge allows him to understand with specificity, precisely what is required from an information technology perspective. Mr. Schilkowski also serves as the office manager of MTS and as such oversees all MTS operations in Mr. DeProfio's absence.

He is a graduate of Eastern Connecticut State University where he earned a Bachelor of Science Degree in Computer Science. He was a Dean's List student and an ODK National Leadership Honor Society Inductee in his senior year. He was also the recipient of a scholarship award in Computer Science from TranSwitch Corporation where he interned while completing his undergraduate degree requirements.

*Office and Field Staff*

Laura O'Toole

Mrs. O'Toole is a part time employee. She joined MTS on August 1, 2005 as our File Control Manager. Her duties and responsibilities included management of our vast

filing system consisting of over 20,000 files. Ms. DeProfio successfully completed our in-house training program and served MTS as a Client Service Specialist. She provided potential taxpayers with explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents should they care to submit rebuttal arguments in response to correspondence from the Office of the Assessor.

Mrs. O'Toole graduated Cum Laude from the University of Bridgeport where she earned a Bachelor of Arts Degree in Social Science. She was a Dean's List student and National Honor Society member. She was also the recipient of a scholarship award from the university. Upon graduation she attended Naugatuck Valley Community College with a course focus on paralegal studies. She subsequently received certification as a Paralegal in the State of Connecticut and currently works full time as a paralegal in a prestigious Law Firm in Connecticut.

Mrs. O'Toole continues service with MTS with an expanded capacity as a consultant on issues relating to CT law and litigation.

#### Julie DeProfio

Mrs. DeProfio joined MTS on July 15, 2005 as our Chief Financial Officer. She is responsible for all aspects of the financial record keeping of MTS. Mrs. DeProfio is a graduate of Western Connecticut State University where she earned a Bachelor of Science Degree in Accounting. She has served as an auditor with the Connecticut Credit Union League, served for two years as the Controller for the Greenwich Teachers Federal Credit Union and for 8 years as the Vice President and Controller for the Stamford Federal Credit Union.

#### John O'Toole

Mr. O'Toole is a part time employee. He joined MTS on June 18, 2006 as a Client Service Specialist and Field Agent. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include acquiring the raw data necessary to initiate an investigation, assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents.

Mr. O'Toole is a graduate of Central Connecticut State University and achieved a Baccalaureate degree in secondary education and possesses a 5<sup>th</sup> year teaching degree. Mr. O'Toole also received a Master of Science in Education. He is currently employed full time as a teacher at a local Connecticut High School.

Mr. O'Toole continues to provide service to MTS on a part time basis as a Field Agent and Client Service Specialist.

Brian Bertanza

Mr. Bertanza is a full time employee. He joined MTS on May 25, 2014 as a Field Agent. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities are acquiring raw and accurate data necessary to initiate an investigation. Mr. Bertanza is a graduate of Andrew Warde High School of Fairfield Connecticut.

Kyle Bertanza

Mr. Bertanza is a full time employee. He joined MTS on March 30, 2015 and serves as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents.

He is a graduate of Emmett O'Brien High School and attended the University of Hartford in Hartford, CT with a focus in Communications and Criminal Justice.

Donald Morgan

Mr. Morgan is a full time employee. He joined MTS on May 24, 2016 and serves as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents. He is a graduate of Emmett O'Brien High School and attended Mitchell College in Hamden, CT with a focus in Sports Management.

*Data verification Specialists*

Wilfredo Vega

Mr. Vega is a contracted employee. Mr. Vega is a former Client Service Specialist and Field Agent. He joined MTS on November 19, 2007 as a Client Service Specialist. He has attended St. John's University in Jamaica, Queens N.Y. and Housatonic Community College with an undergraduate focus in Accounting. Mr. Vega is bilingual and not only speaks both Spanish and English but reads and writes both languages as well. Mr. Vega was employed full time until he relocated to the State of Florida in 2016.

Stephen Schilkowski

Mr. Schilkowski is a contracted employee. Mr. Schilkowski is a former Client Service Specialist He joined MTS on September 14, 2014. He is a graduate of New York University, New York, N.Y. and holds a Bachelor of Arts Degree in Political Science with concentrations in Political Theory, International Politics and American Politics. He also maintained a minor course of study in Philosophy with concentration in Ethics. Mr. Schilkowski was employed full time until he relocated to the State of Tennessee in 2016.

Both of these individuals were excellent and valued employees. Currently they verify the raw data collected and make corrections as necessary. They operate remotely by accessing our server via an FTP site and are compensated as independent contractors. The work they perform is extremely valuable since it frees our office staff from having to perform that task and allows them to concentrate on servicing the potential taxpayers.

All MTS employees past and current are registered to work under Carl M. DeProfio's Private Detective Agency license (Department of Public Safety license # A-902).

9. The approach to be followed in undertaking the tasks outlined in the Request for Proposal

The approach to be followed in undertaking the task for Stamford is as follows:

Phase I

1. Meet with the appropriate City Officials to ascertain specific responsibilities with regard to the program.
2. Meet with the assessor to ascertain his application of the specific laws he is empowered to enforce.
3. Establish the criteria the assessor wishes this firm to adhere to and completely cover all aspects of the process.
4. If needed, establish and conduct training sessions for those city employees who interact directly with the taxpayers. This typically involves only those employees who work in the offices of the Assessor and the Tax Collector.

Phase II

1. Deployment of agents into the city to acquire the raw data necessary to begin the process.
2. Entry of the data into our system.
3. Acquisition of owner information for the vehicles identified.
4. Acquisition of supporting evidence to determine residence of the owners of the suspect vehicles.

5. Acquisition of supporting evidence to support a prima facie case regarding assessment of the suspect vehicles.

### Phase III

1. Compose and prepare "First Letter" correspondence between the Assessor and the potential taxpayer.
2. Receive all telephonic and written communication from the potential taxpayer and prepare rebuttal responses for the Assessor's approval.
3. Maintain all files, electronic and written, generated and received with respect to each case.
4. Maintain close contact with the Assessor, or their representative, to determine taxability of all vehicles identified during our investigation.

### Phase IV

1. Once taxability has been determined we will prepare all required vehicle assessment data on behalf of the Assessor and forward the data to his office to be uploaded into their Assessment and Collections software system
2. Support all investigative work, preserve and maintain each file for future reference by the Assessor, Corporation Counsel or other City Officials as the need arises.

### *Services Expected of the City*

#### The nature and scope of the services required of the City in undertaking this project

The City is expected to provide various services to assist in the identification, investigation and record retention process. They are also expected to provide an accurate record of payments received for those files generated as a result of our efforts. Additional expectations are for the City to provide the following:

1. Electronic Copies of the City's Real Estate and Motor Vehicle Grand Lists for all pertinent future and prior tax years.
2. Obtain access to Connecticut (CT) and New York (NY) Department of Motor Vehicles (DMV) registration data. Respond in a timely manner to informational requests regarding ownership of CT and NY registered vehicles.
3. An electronic copy of the Assessor's letterhead and envelope used for preparing mailing correspondence on behalf of the Assessor.
4. Timely upload of assessment data provided to the City by MTS.
5. Monthly reports of all payments received as a result of any case initiated by this firm. Such records of payments shall include specific information to adequately identify the taxpayer, the tax year paid, whether the payment was a full or partial payment and all other relevant information to adequately identify the file for archival purposes. All such monthly reports should be

electronically forwarded to MTS as soon as possible after the close of business for each month but no later than the 10th day following the close of business for each month.

6. Timely payments, as outlined in the contract, should it be awarded to this firm. All payments to MTS are to be made within 30 calendar days following the close of business for the preceding month where the collections occurred.

It is also expected that the City and those employees who directly interact with the taxpayers support the program and the efforts of the Assessor.

MTS has worked closely with a number of municipalities which utilize Quality Data Systems (QDS) software designed for Tax Assessors and Tax Collectors. Those municipalities include Bridgeport, Hartford, North Haven and Waterbury. We also have a working relationship with QDS and have discussed various issues with them in the past. Our system and electronic file uploads are compatible and seamless with QDS software, aiding the City in complying with item 4 listed in the Services Expected of the City.

10. Any special requests or expansion of the scope of work beyond that described in the Scope of Services of this Request for Proposal would be a negotiated fee at the time of the request.
11. For the past thirteen (13) years, MTS has provided the type of services articulated in the *Scope of Services* section of this RFP. During this time we have provided municipalities with assessment figures, which proportionally, are far beyond that which was accomplished in any prior endeavor. Our "state of the art" data gathering and management systems enable us to accumulate and process information more quickly and efficiently than ever before in a secure and stable environment. This enables the assessor to make an accurate and informed decision regarding assessment of vehicles faster and more efficiently.

Our system provides up to date statistics which can be accessed by the assessor at any moment in time. As adjustments are made, the statistics are updated automatically and provide breakdowns into various categories of interest to the assessor. The system will accommodate any category of vehicle or other personal property and will instantly reveal all statistics akin to that category. This statistical analysis feature built into our system is of great interest and significant value to any tax assessor.

MTS's program has been designed to assist the individual assessor and is tailored to meet his/her specific criterion. That is, we understand that individual assessor's have different philosophies in how they apply the law. Our program has the flexibility so that it can be tailored to meet the needs of the individual assessor. We are committed to understanding the assessor's application of the law regarding the assessment of property tax on motor vehicles and working with them to keep the most effective program in place for Stamford.

MTS is fully insured and as reported above, the Managing Member, Carl M. DeProfio, is a licensed Private Investigator in Connecticut. A Private Detective license is required to provide the type of service requested in this RFP. CGS 29-153 states in part that "No person shall engage in the business of or furnish detective or investigative services without first obtaining a license from the Commissioner of Public Safety." Since this service requires a systematic inquiry into individuals and business entities and the accumulation of information as a result of those inquiries, it is an investigative service. Under the law, investigative services require the type of license held by Mr. DeProfio. Every employee is required to be registered with the Department of Public Safety and therefore is authorized to work under Mr. DeProfio's Private Detective license.

Additionally, since we routinely amass and manage information of a proprietary and confidential nature, our company is fully insured and meets the limits of liability requested in this RFP.

Every employee is screened and a criminal background check is conducted prior to hiring. Every employee is required to sign non-disclosure, non-compete and confidentiality agreements with MTS. They must also sign a "Certification of Tax Compliance" affidavit attesting that they are current and will remain current, with all federal, state and local tax obligations. Any failure to do so will result in their termination of employment with MTS.

## **12. Technology and Maximizing Benefit**

Our process of gathering the raw data, identifying potential taxpayers and acquiring the necessary information to pursue assessment of their motor vehicle(s) increases the speed at which we function, enhances the degree of accuracy of our investigation and significantly increases the capacity of information we can process in a short period of time. This will allow Stamford to realize the maximum benefit possible during the contract term.

Our field agents acquire data utilizing the patented Securewatch24 system utilizing AutoVu™ and also through physical observation and voice recorded information. The AutoVu™ automatic license plate recognition (ALPR) system automates license plate reading and identification, making it easier for law enforcement and for municipal and commercial organizations to locate vehicles of interest and enforce parking restrictions. Designed for both fixed and mobile installations, the Securewatch24 system is ideal for a variety of applications and entities, including law enforcement, municipal, and commercial organizations. MTS will utilize Securewatch24's mobile system to compile data on motor vehicles located within the boundaries of Stamford.

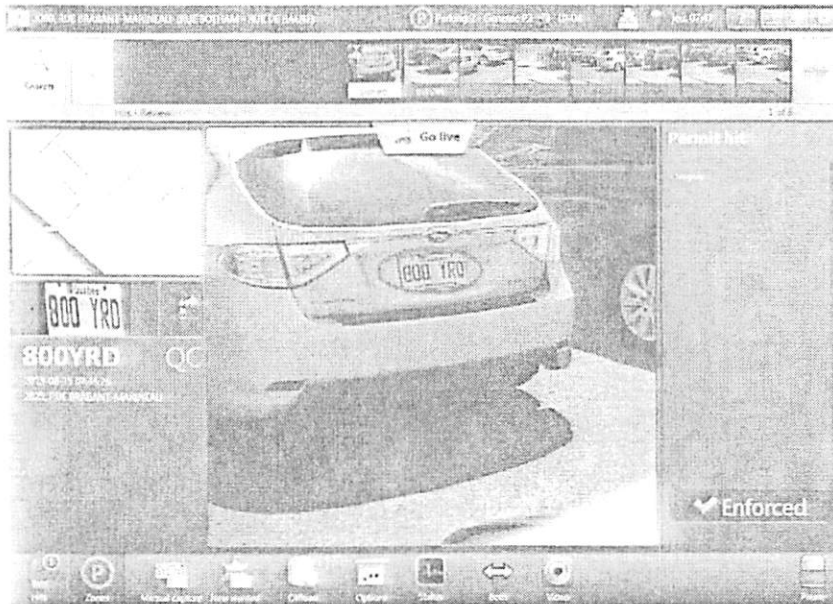
The Securewatch24 AutoVu™ system is integrated with a SharpX camera which is mounted on our agent's vehicle. The SharpX is an IP-based ALPR camera

designed for mobile application with its small form factor, high resolution, and integrated illumination, the SharpX captures more license plates in a variety of conditions and at high speeds. Supporting up to four cameras connected to a single external processing unit, the SharpX ensures maximum coverage and the highest degree of accuracy in parked and on the move applications.



SecureWatch24's patented system incorporates a GPS platform which automatically records the date, time, and location of the vehicle. The system displays the images captured on the agent's laptop computer and the data is stored in an external database for later use by the agent.





The AutoVu™ reads are uploaded into our system electronically and the voice recorded information is entered by the agent who acquired the data thus reducing the possibility of errors. Once entered, the data is processed through our secured data management system. This system was developed by MTS for the purpose of expediting the processing of the information gathered during our investigation. The process efficiencies we have perfected allow us to deliver the information needed to issue tax assessments resulting from our service at an increased volume in a shorter amount of time. For example, during our contract terms in the municipalities identified we have identified over 38,000 vehicles representing over 62,000 tax years with a net assessed value of over \$425 million.

**APPENDIX A  
INSURANCE**

MTS maintains the following insurance of which the City of Stamford would be included as an additional insured:

**A. Professional Liability Insurance**

Professional Liability (also known as errors and omissions) – Insurance providing coverage to MTS in the amount of One Million (\$1,000,000.00) each claim and with an aggregate limit of two million (\$2,000,000.00) dollars.

**B. Workers' Compensation Insurance**

Adequate and statutory insurance to protect MTS from claims under Worker's Compensation Acts arising from or connected with the performance of its services under any contract. Currently our policy provides Employer Liability Insurance as follows:

- I. Bodily injury by accident: \$100,000 Each Accident
- II. Bodily injury by disease: \$ 100,000 Each Employee
- III. Bodily injury by disease: \$ 500,000 Policy Limit

**C. Motor Vehicle Insurance**

MTS maintains Commercial Automobile insurance covering the operation of all motor vehicles, including those owned, or not owned, hired or borrowed, used by the company in connection with municipal contracts, including supplements thereto in the following amounts:

Liability in the amount of \$1,000,000.00

Hired, not owned coverage in the amount of \$1,000,000.00

**D. Commercial General Liability**

MTS maintains General Liability Insurance providing the following coverage:

General Aggregate:	\$2,000,000.00
Products & Completed Operations Aggregate:	\$2,000,000.00
Personal & Advertising Injury-each occurrence:	\$1,000,000.00

Damage to Rented Premises-each occurrence: \$500,000.00  
Medical Expense (Any one person): \$5,000.00  
Bodily Injury & Property Damage (Any one occurrence) \$1,000,000.00

**E. Cancellation of Insurance**

MTS will not suspend, reduce or cancel, either in coverage or in limits, any insurance provided for the purpose of carrying out the proposed contract with Stamford, to the extent that it is able, without 30 days prior written notice to the City.

**F. Indemnification & Hold Harmless**

MTS currently indemnifies contracted municipalities from any and all claims arising or resulting from the performance of services directly related to the contractor's involvement in any present or future agreement.

**G. Waivers of Subrogation**

All insurance required in this proposal shall contain waivers of subrogation against the City and its employees, agents and officers.

If awarded a contract relative to this RFP, MTS prior to commencement of services, will provide to the City Certificates of Insurance demonstrating the aforementioned requirements.

## APPENDIX B

### COST SCHEDULE

1. Total compensation payable to MTS for providing the aforementioned service will be determined as follows:
  - A. The compensation will be 50% of the total taxes, penalties and interest collected for any tax years billed as a result of the MTS investigation plus a \$50.00 per vehicle identification fee which is added to the tax bill under CGS 12-140 and paid to Stamford by the violator.
  - B. Stamford shall not be obliged to compensate MTS until the actual receipt of monies from the taxpayer takes place. For purposes of the proposed contractual agreement, said fee and compensation, due to MTS shall be dispersed to MTS within Thirty (30) days after the close of the calendar month such amounts are collected by the City. Any sums received from taxpayers whether said sums are in full or partial payment of all sums due for each vehicle shall be dispersed to MTS utilizing the formula and time schedule set forth herein.
  - C. Stamford would agree to provide MTS with an accounting of receipts for each disbursement under the proposed contract as soon as possible, but no later than ten (10) days, following the close of the calendar month wherein such receipts are collected by the City.
  - D. Compensation provided for under this agreement, would constitute full and complete payment for all costs assumed by MTS in performance of the proposed contract. It includes but is not limited to salaries, consultant fees, costs of materials and supplies, printing and reproduction, meetings, consultations, presentations, travel expenses, postage, telephone, clerical expenses, and all similar expenses. Stamford shall assume responsibility for mailing costs associated with correspondence under its signature.
  - E. No contract for employment is intended or implied via the proposed Agreement and no fringe benefits will be paid to MTS hereunder. It is intended that the relationship of MTS to Stamford be that of an independent contractor.
  - F. MTS will be responsible for the cost of advertising, soliciting, database management and other expenses under their direct control.
  - G. In the event the City fails to follow through with the terms of the agreement or opts out, after a fully executed agreement is in place, the City shall compensate MTS for uploaded files pursuant to the terms of the agreement as outlined in "A" through "C" above.

- H. The City will compensate MTS for all costs previously assumed by MTS, excluding the aforementioned uploaded files, which are associated with performed services as specified in the "Scope of Services" section of this Proposal and outlined in "D" above .

## **APPENDIX C**

### **Acceptance, Authorization, Warrants and Forms**

#### **Acceptance**

MTS has reviewed and accepts the City's requirements, standards and compliance with all local ordinances as well as state and federal laws articulated in the RFP.

#### **Authorization**

MTS hereby authorizes the City of Stamford to verify any and all information presented in this proposal. To that end, the City may contact any person, firm or corporation to furnish any information requested by the City of Stamford to verify any of the recitals included in this response to the City's RFP.

#### **Warrants**

MTS warrants that this proposal is not made in connection with any other proposer and is in all respects fair and without collusion or fraud. MTS further represents and warrants that it did not participate in any part of the RFP development process, and had no knowledge of the specific contents of the RFP prior to its issuance, and that no agent, representative or employee of the City participated in the preparation of this proposal.

Additionally, the cost schedule has been arrived at independently without collusion, consultation, communication or agreement with any other Proposer or competitor and has not and will not be disclosed by this Proposer prior to opening, directly or indirectly, to any other Proposer or competitor. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not submit a Proposal for the purpose of restricting competition.

MTS has had no contact with any other proposer or City official directly related to the RFP

#### **Forms**

The following forms included with the RFP are as follows:

- Contractors Statement.
- Bidder Contract Compliance Monitoring Report
- Acknowledgement Addendum No. 1 (May 21, 2018)

**Acknowledgement of Addendum No. 1  
(May 21, 2018)**

The proposer acknowledges receipt of the aforementioned addendum on May 22, 2018.

**CONTRACTOR'S STATEMENT**

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or member:

Carl M. DeProfio - 19 Lily Lane, Huntington, CT 06484

Carl R. DeProfio - 283 Plains Rd, Milford, CT 06461

\_\_\_\_\_

\_\_\_\_\_

If a corporation, the names and addresses of all officers and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% of the common or preferred stock of said holding company.

N / A

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

NONE

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of Bidder/Proposer: Carl M. DeProfio

Signature of Bidder/Proposer: *Carl M. DeProfio*

Title: Managing Member

Company Name: Municipal Tax Services LLC

Address: PO Box 2254, Huntington, CT 06484-1254

\_\_\_\_\_



3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

<p><b>White</b> (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.</p> <p><b>Black</b> (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa.</p> <p><b>Hispanic</b>- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.</p>	<p><b>Asian or Pacific Islander</b>- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa.</p> <p><b>American Indian or Alaskan Native</b>- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.</p>
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**BIDDER CONTRACT COMPLIANCE MONITORING REPORT**

**PART I - Bidder Information**

<p>Company Name: Municipal Tax Services LLC                  Street Address: 120 Long Hill Cross Road                  City &amp; State: Shelton, Connecticut                  Chief Executive: Carl M. DeProfio</p>	<p>Bidder Federal Employer                  Identification Number: 20-2879422                  Or                  Social Security Number:</p>
<p>Major Business Activity:                  (brief description)                  Locate &amp; identify Motor Vehicles and business property not included on on a municipality's Grand List. Then investigate to determine if the property should be added to that that municipality's Grand List and for which tax years.</p>	<p>Bidder Identification                  (response optional/definitions on page 1)</p> <p>-Bidder is a small contractor? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>                  -Bidder is a minority business enterprise? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>                  (If yes, check ownership category)                  Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian American <input type="checkbox"/>                  American Indian/Alaskan Native <input type="checkbox"/> Iberian Peninsula <input type="checkbox"/>                  Individual(s) with a Physical Disability <input type="checkbox"/> Female <input type="checkbox"/>                  -Bidder is certified as above by State of CT? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Bidder Parent Company:                  (If any)</p>	
<p>Other Locations in CT:                  (If any) NONE</p>	

**PART II - Bidder Nondiscrimination Policies and Procedures**

<p>1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 &amp; 4a-60a Conn. Gen. Stat.?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>9. Does your company have a mandatory retirement age for all employees?                  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/></p>
<p>5. Do you notify the Ct. State Employment Service of all employment openings with your company?                  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor?                  Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/></p>
<p>6. Does your company have a collective bargaining agreement with workers?                  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>                  6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes <input type="checkbox"/> No <input type="checkbox"/>                  6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT?                  Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>12. Does your company have a written affirmative action Plan?                  Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>                  If no, please explain.</p>
	<p>13. Is there a person in your company who is responsible for equal employment opportunity? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>                  If yes, give name and phone number:                  Carl M. DeProfio - 203-402-0780</p>

1. Will the work of this contract include subcontractors or suppliers? Yes  No

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes  No

**PART IV - Bidder Employment Information**

Date:

JOB CATEGORY *	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management	2	2									
Business & Financial Ops	2	1	1								
Marketing & Sales											
Legal Occupations	1		1								
Computer Specialists	2	2									
Architecture/Engineering											
Office & Admin Support	5	4				1					
Bldg/ Grounds Cleaning/Maintenance											
Construction & Extraction											
Installation, Maintenance & Repair											
Material Moving Workers											
Production Occupations											
<b>TOTALS ABOVE</b>	<b>12</b>	<b>9</b>	<b>2</b>			<b>1</b>					
Total One Year Ago	12	9	2			1					
<b>FORMER ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)</b>											
Apprentices											
Trainees											

\*NOTE. JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

**PART V - Bidder Hiring and Recruitment Practices**

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)

SOURCE	% of applicants provided by source	
	YES	NO
State Employment Service	<input type="checkbox"/>	<input type="checkbox"/>
Private Employment Agencies	<input type="checkbox"/>	<input type="checkbox"/>
Schools and Colleges	<input type="checkbox"/>	<input type="checkbox"/>
Newspaper Advertisements	<input type="checkbox"/>	<input type="checkbox"/>
Walk Ins	<input type="checkbox"/>	<input type="checkbox"/>
Present Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>
90%		
Union Membership	<input type="checkbox"/>	<input type="checkbox"/>
above on items contained in the training program.		
Personal Recommendation	<input type="checkbox"/>	<input type="checkbox"/>
Minority/Community Organizations	<input type="checkbox"/>	<input type="checkbox"/>
Height or Weight	<input type="checkbox"/>	<input type="checkbox"/>
Others (please identify)	<input type="checkbox"/>	<input type="checkbox"/>
Assessors	<input type="checkbox"/>	<input type="checkbox"/>
10%		
Annual Record	<input type="checkbox"/>	<input type="checkbox"/>
Wages/Guarantees	<input type="checkbox"/>	<input type="checkbox"/>

2. Check (X) any of the below listed requirements that you use as a hiring qualification

(X)

3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination. Each employee must:  
 Pass a criminal background check since they must be registered with the Dept. of Public Safety to work under the owner's Private detective license.  
 Complete an in house training program regarding laws related to tax assessment.  
 Achieve a test score of 80% or above on items contained in the training program.  
 Complete 3 months of training with a senior agent.  
 Sign non-compete, disclosure & confidentiality agreements.

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN GEN STAT.

(Signature) <i>Tom M. B.../...</i>	(Title) Managing Member	(Date Signed) 5/21/18	(Telephone) 203-402-0780
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