

Town of Watertown
Request for Proposal
2023 Reevaluation of Real Property
(Taxable & Exempt)

The Town of Watertown requests proposals for the reappraisal and revaluation of all real property (taxable and exempt) located within the corporate limits of the Town of Watertown CT effective October 1, 2023. Only proposals from State verified revaluation companies will be considered. Request for Proposal documents may be obtained or examined at the office of Purchasing Agent, Town Hall, 61 Echo Lake Rd Watertown CT 06795, or by accessing the Town of Watertown's website at www.watertownct.org. Sealed proposals must be submitted no later than **11:00 AM, Monday, June 13, 2022**. Any requests for Proposals received after said date and time, whether hand-delivered, submitted via US Postal Service, or submitted via any other delivery service shall be declared invalid. The Town of Watertown reserves the right to award in part, to reject any and all proposals in whole or in part, or to waive technical defects, irregularities, and omissions if in its judgment the best interest of the Town will be served. Questions shall be submitted electronically to Richmond@watertownct.org

Donna Ford
Purchasing Agent

**THE REVALUATION OF ALL REAL
PROPERTY (TAXABLE AND EXEMPT),
LOCATED WITHIN THE CORPORATE LIMITS
OF THE TOWN OF WATERTOWN, CT 06795
EFFECTIVE OCTOBER 1, 2023.**

The undersigned Proposer affirms and declares:

1. That this PROPOSAL is executed by said Proposer with full knowledge and acceptance of the CONTRACT (including the Reappraisal and Revaluation Specifications) enclosed with the REQUEST FOR PROPOSALS on the subject project.
2. That should this PROPOSAL be accepted in writing by the **OFFICE OF THE PURCHASING AGENT** of the TOWN OF WATERTOWN, Connecticut, said Proposer will furnish the services for which this PROPOSAL is submitted at the price bid and in compliance with the provisions of said **CONTRACT**.
3. That this PROPOSAL is accompanied by the surety in the form and amount indicated below:
4. Proposal to include **\$40,000** for the services of **Eagleview**.
5.

	Bid Proposal Bond	Amount \$	
	Certified Check	Amount \$	
6. That the Proposer or his or her representative has visited the TOWN of WATERTOWN; is familiar with its geography, general character of houses, and its commercial and industrial areas; has examined the quality and condition of the **ASSESSOR'S** records; verified the parcel counts, and has met with the **ASSESSOR** to make himself or herself knowledgeable of those matters and conditions in the **TOWN** which would influence this bid proposal.
7. That all items, documents, and information required to accompany this PROPOSAL of the aforesaid CONTRACT are enclosed herewith.
8. That the Proposer proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid CONTRACT for the following amount:

\$ _____
9. Proposed scheduled prices for the aforementioned proposals are valid for Sixty (60) days.
10. That the Proposer understands and accepts that, although the proposed price is a major factor for consideration, the **TOWN** reserves the right to award the contract to other than the low-cost

Proposer after an analysis of the additional factors outlined in the aforesaid CONTRACT. The TOWN reserves the right to reject any and all proposals, to waive any informalities and technicalities; and to accept that proposal which the TOWN deems to be in the best interest of the TOWN.

FIRM NAME OF PROPOSER

AND ADDRESS

BY: SIGNATURE

TYPE NAME:

TITLE:

CONTACT INFORMATION

(PHONE & E-MAIL)

APPENDIX A

CONTRACT SPECIFICATIONS

DEFINITIONS

ASSESSOR - The word “**ASSESSOR**” shall mean the duly appointed **ASSESSOR** of the TOWN of WATERTOWN, Connecticut.

CAMA - The abbreviation “**CAMA**” means a Computer Assisted Mass Appraisal System.

CONTRACTOR – The word “**CONTRACTOR**” shall mean any person, firm, corporation, association, or other entity proposing to perform or, after awarding of the PROJECT, being awarded the job to perform the **PROJECT**.

CONTRACT SPECIFICATIONS - The terms “**CONTRACT SPECIFICATIONS**” or “**SPECIFICATIONS**” shall mean this **EXHIBIT A** which has been attached to, and made part of, a certain **CONTRACT** between the **TOWN AND CONTRACTOR** and any addenda thereto.

PROJECT – The word “**PROJECT**” shall mean the revaluation and reappraisal of all taxable and exempt real property within the corporate limits of the TOWN of WATERTOWN, Connecticut.

TOWN – The word “**TOWN**” shall mean the **TOWN of WATERTOWN**, Connecticut

I. SCOPE OF REAPPRAISAL AND REVALUATION

This PROJECT includes the complete reappraisal and revaluation of all real property within the corporate limits of the TOWN of WATERTOWN, Connecticut.

The successful CONTRACTOR shall furnish the database, labor, materials, supplies, and equipment to perform all work for the project in strict accordance with the hereinafter listed specifications.

All work will be carried out and all forms, materials, and supplies utilized on this PROJECT shall conform to and be carried out in accordance with the requirements of the Secretary of the Office of Policy and Management, the Connecticut General Statutes, and Regulations of Connecticut State Agencies pertaining hereto and shall be subject to the direct supervision and approval of the ASSESSOR of the TOWN.

The values to be determined shall be the full fair market values as defined in Section 12-63 of the Connecticut General Statutes and shall be based upon recognized methods of appraisal and conform to Uniform Standards of Professional Appraisal Practices, as required by Connecticut General Statutes, for the licensing and certification of all individuals involved with the appraisal of real estate.

EFFECTIVE DATE

The effective date of this revaluation PROJECT shall be for the October 1, 2023, Grand List, and the pricing valuation by the CONTRACTOR of all land, buildings, and property under this CONTRACT shall reflect the fair market values as of October 1, 2023

TOWN DATA

Date of Last Revaluation-----October 1 ,2018.
 Estimated Population-----~21,578
 Area of the Town-----29.60 square miles
 Forms of Government-----Town Council / Town Manager
 Total Parcels to base the proposal on ----- 9217

Hybrid Revaluation

Residential and Condominiums	Select
Introduction Letter	X
Photo of each building with Living Area	
Using technology	
In-Person	
Exterior	
Full Exterior only measure as needed	
Exterior Flyover outliers only	
Interior	
Data Mailer only	
Return Postage Paid Envelope?	
Second Mailing for No Responses	
Other Technology	
Utilize Online Data Mailer	X
Utilize Virtual Inspections	X

Commercial	Select
Introduction Letter	
Exterior	
Full Exterior MEASURE EVERY WALL*	
Exterior Flyover outliers	X
Interior	
Full Interior (not valid during COVID)	X
At door (during COVID)	X
Commercial Uses Verified/Updated	
In-Person	X
Using I&E	X
Other Technology	
Utilize Virtual Inspections	X

***If measurements are approved by Eagleview, visitation is still required for measurements, use, and segments verification**

Sales and Permits

	Select
Permits	120
Number of years	ONE
Exterior Measure	80
Interior (not valid during COVID-19)	VIRTUAL
Sales	250
Number of years	ONE
Exterior Condition/Class	2%
Interior (not valid during COVID-19)	SEE ONLINE MLS
Using online Listings Only	YES
Sales Verification Letter	YES
Return Postage Paid Envelope?	YES

Field Review

Field Review	Estimated Driving Days	Assessor in Car?
Drive-by every parcel	NO	N/A
Use Technology & Drive by Pockets	3	NO
Desk Review & Drive by Pockets	N/A	N/A

Total counts to use for Estimating

Property Type	Total Parcels	% Exterior Inspections	Total Exterior Inspections	Total Buildings	% Interior Inspections	Total Interior Inspections
Residential	7941	5%	397	7400	5%	370
Condominium	522	1%	52	566	1%	56
Commercial	754	100%	754	516	10%	51
Total						
Permits						
Sales						
Final Total						

II. GENERAL CONDITIONS

A. CONTRACTOR

Each company, corporation, partnership, or individual hereinafter termed CONTRACTOR, must hold from the time of submission of the proposal through the completion of all work hereinafter required, a valid Connecticut Revaluation Company Certification pursuant to Section 12-1c of the Connecticut General Statutes.

B. PERSONNEL

The CONTRACTOR shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provision of Federal and State governments. The CONTRACTOR shall submit to the TOWN written qualifications of all personnel assigned to this PROJECT. All personnel assigned to this PROJECT shall be subject

to the approval of the ASSESSOR prior to the commencement of the individual's duties with the TOWN and may be removed for cause from this PROJECT by the CONTRACTOR upon written notification from the ASSESSOR.

III. MINIMAL QUALIFICATIONS

A. PROJECT MANAGER OR SUPERVISOR

The CONTRACTOR shall assign the administration of this PROJECT to a project manager or supervisor, who shall be certified by the State of Connecticut as a Revaluation Supervisor pursuant to Section 12-2c of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time and shall have not less than five (5) years of practical appraisal experience in the appraisal of commercial, industrial, apartment, and residential type properties. The project manager or supervisor shall be subject to approval by the ASSESSOR.

B. REVIEWERS AND APPRAISERS

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program pursuant to Section 12-2c of the Connecticut General Statutes and such other statutes and regulations that the State of Connecticut may promulgate from time to time and shall not have not less than five (2) years of practical appraisal experience in the appraisal of the particular type of properties for which they are responsible. Two (2) years of this experience shall have been in the mass appraisal field and shall have occurred within the past eight (5) years. All reviewers and appraisers shall be subject to the approval of the ASSESSOR prior to the commencement of their duties on this project.

C. IDENTIFICATION

For the purposes of reviewing properties for market analysis or photographic images, all field personnel shall have visible clip-on identification cards which shall include an up-to-date photograph supplied by the CONTRACTOR and signed by the ASSESSOR of the TOWN. In addition, all field personnel shall carry a "letter of introduction" signed by the ASSESSOR. All automobiles used by field personnel shall be registered with the Police Department giving the license number, year, make, model, and color of all vehicles used on this PROJECT.

D. CONFLICT OF INTEREST

No resident of the TOWN or TOWN employee shall be employed by the CONTRACTOR without prior approval of the ASSESSOR.

E. BACKGROUND CHECK: ALL PERSONNEL WILL BE SUBJECT TO BACKGROUND CHECKS BY THE WATERTOWN POLICE DEPARTMENT.

IV. PROTECTION OF THE TOWN

A. BONDING

To secure faithful performance by the CONTRACTOR, of the terms of this agreement, shall furnish to the TOWN a Performance Surety Bond the amount of this CONTRACT, which bond shall be issued by an admitted bonding company licensed to do such business in the State of Connecticut with a minimum A.M. Best Company rating of at least "A-/VIII". Said bond shall be delivered to the TOWN prior to the commencement of the actual work and shall be in a form satisfactory to the TOWN Attorney. This bond shall include the appeal requirements of these SPECIFICATIONS. It is understood and agreed that upon completion and delivery of the revaluation to the TOWN, the performance bond shall be reduced to ten (10%) of the value of the contract to cover the defense of all appeals. This reduced bond amount shall become effective until a final resolution in the courts of any timely appeals taken from the doings of the Board of

Assessment Appeals on the October 1, 2023, Grand List. The TOWN reserves the right to waive any insurance requirement if it is in the best interest of the TOWN.

B. INSURANCE

The CONTRACTOR shall, at its own expense, provide and keep in force:

1. Workers' Compensation insurance in the required amount and employers' liability insurance in the following amount:

- Bodily injury by accident - \$100,000 each accident
- Bodily injury by disease - \$500,000 each accident, and
- Bodily injury by disease - \$100,000 each employee

The policy must provide coverage for benefits payable under the Connecticut Workers Compensation Act, and include the Voluntary Compensation endorsement.

2. Appraiser's professional liability insurance providing errors and omissions coverage for professional services rendered as an appraiser. The minimum limit of liability shall be \$1,000,000 per claim subject to \$2,000,000 aggregate. Any deductible applicable to a claim must be noted on the Certificate of Insurance. If the policy is written on a claim made policy form, the insurance must be maintained by the CONTRACTOR for a period of two (2) years from the completion of the contract.

3. During the term of the CONTRACT, the CONTRACTOR shall provide general liability insurance for bodily injury and property damage. The public liability insurance shall be written on a Comprehensive form and include without limitation, coverage for premises and operations, completed operations, independent contractors, broad form property damage, and blanket contractual personal injury. The required limits of liability are:

- \$2,000,000 - General Aggregate
- \$2,000,000 - Product Completed Operations Aggregate
- \$1,000,000 - Personal and Advertising Injury / \$1,000,000 EACH OCCURENCE
- \$ 50,000 - Fire Damage/Fire
- \$ 5,000 - Medical Expense/Person

The TOWN must be named as an Additional Insured on the policy.

4. Automobile liability insurance shall be written with a Comprehensive Form and include coverage for hired, owned, and non-owned vehicles. The limit for any one accident or loss shall be \$1,000,000.

The TOWN must be named as an Additional Insured on the policy.

C. LIQUIDATED DAMAGES

Liquidated damages shall be deducted from the CONTRACT price and will represent a fair and equitable estimate of damages the TOWN will suffer if the CONTRACTOR'S work is not completed by January 31, 2024. The TOWN shall have the right to use the funds withheld from each periodic payment to the CONTRACTOR, to satisfy in whole or in part, this liquidated damages clause. Delays occasioned by war, strike, explosion, acts of God, or an order of court or other public authority are accepted.

Failure by the CONTRACTOR to complete all work prior to the date specified herein, DECEMBER 15, 2023, shall be cause for a penalty payment by the CONTRACTOR upon request of the ASSESSOR in the amount of TWO HUNDRED FIFTY DOLLARS (\$250.00) per day beyond the specified date of completion. The CONTRACTOR agrees that this is fair value and that it reasonably approximates the cost to the Town for any delays beyond the mandatory completion date of DECEMBER 15, 2023. For the purpose of this penalty only, completion of all work not later than DECEMBER 15 2023

1. Completed CAMA database, integration of CAMA software with administrative software, property record cards with all measurements, listing, sketches, photographic images, pricing, review, and final valuation.
2. Assessment change/data mailer notices mailed to comply with requirements of Connecticut State Statutes.

V. CHANGES TO THE CONTRACT

A. CHANGES

Changes in these specifications to the CONTRACT will be permitted only upon written mutual agreement of the CONTRACTOR and the TOWN or the ASSESSOR.

B. COMPLETION DATE AND TIME SCHEDULE

The revaluation work may be started at the convenience of the CONTRACTOR, but not later than August 8, 2022, or 7 days after contract signing and must continue in a diligent manner so as to ensure completion within the schedule of completion dates as set forth below: The following phases of revaluation must be completed in accordance with the following schedule:

Key Milestones	Target Date
Start	August 1, 2022
Town Access to the Revaluation Data	August 1, 2022
Preliminary Land Study and Neighborhood Delineation	July 3, 2023,
Preliminary Numbers and Cost Book	July 3, 2023
Market Rents Study	July 3, 2023
Complete Data Collection and Entry	August 15, 2023
Complete Review	September 5, 2023
Final Collection of Permits and Sales	October 10, 2023
Turn over Values to the Assessor	November 6, 2023
Finalized Assessments	November 13, 2023
Assessment Notices Mailed	November 20, 2023
Informal Hearings Start	December 18, 2023
Informal Hearings End	January 17, 2024
Inspections and Changes Completed	January 22, 2024
Informal Results Mailed	January 22, 2024
Final Installation of the Software & Admin Bridge in the Town	January 31, 2024
Final Cards Printed	January 31, 2024
Close of Contract	January 31, 2024

C. PAYMENT SCHEDULE

1. PERIODIC PAYMENTS

Payments shall be made in the following manner:

Thirty (30) days after the execution date of this CONTRACT and at the end of each thirty (30) day period thereafter for the term of this contract, the CONTRACTOR will certify in writing to the ASSESSOR the percentage of the total work completed under the CONTRACT which the CONTRACTOR has performed during the said thirty (30) day period. Such notification will itemize and accurately indicate the extent and nature of the work performed by volume, street category, or in any manner as required by the ASSESSOR. The itemization shall be categorized by each of the "Stages of Completion" listed on the schedule in Section D-2 below.

The TOWN upon the determination by the ASSESSOR will pay the CONTRACTOR the percentage of the total compensation under the contract equal to the percentage of the work certified as having been completed during said period as outlined in the "Stages of Completion". The TOWN will retain ten percent (10%) from the CONTRACTOR for payment until such time that he or she has fully and satisfactorily performed ALL its obligations, requirements, and litigations under the CONTRACT.

2. STAGES OF COMPLETION

Chart to be Included by **CONTRACTOR**

This CONTRACT makes provisions for a reduction of the performance bond to ten percent (10%) of the contract price so as to ensure the defense of any appeals resulting from revaluation work.

VI. CAMA REQUIREMENTS

A. ASSESSMENT ADMINISTRATION MODULE

The CAMA System shall have the ability to interface with the assessment administration and tax collection modules. The CONTRACTOR is responsible for matching all parcels and accounts in the appraisal file with the administrative file. The CONTRACTOR shall be responsible for entering an account number or other acceptable means of parcel identification on the CAMA System from which the ability to transfer values from one system to other arises. A list of all discrepancies between the appraisal and administrative system shall be submitted to the ASSESSOR with recommendations for correcting such discrepancies. The CONTRACTOR shall be responsible for all costs of bridging the CAMA System to the Administrative/tax billing system.

B. CAMA SYSTEM *(To be quoted separately if upgrade is desired)*

The valuation module shall provide for the determination of the value of all real property based on accepted appraisal methodology, using a table- or formula-driven system. At a minimum, the valuation module shall have the ability to perform the tasks described below and conform to all requirements and recommendations of the Office of Policy & Management. The CAMA System must meet the requirements as provided for in Section 12-62f-1 to 12-62f-6 of the Regulations of Connecticut State Agencies.

VII. RESPONSIBILITIES OF THE CONTRACTOR

A. GOOD FAITH

The CONTRACTOR shall in good faith use its best efforts to assist the ASSESSOR in determining accurate and proper fair market valuations and shall not undervalue or overvalue any land, building, or other property to avoid or minimize its responsibilities under Section V. (H)

B. PUBLIC RELATIONS

The parties of this revaluation PROJECT recognize that a good public relations program is required in order that the public of the TOWN may be informed as to the purpose, benefits, and procedures of the revaluation.

The CONTRACTOR shall provide reasonable assistance to the ASSESSOR in conducting a program of public information through the press and other media. This will include but not be limited to meetings with citizens, clubs, associations, and property groups as a means of establishing understanding and support for the revaluation. The CONTRACTOR shall have visual aids and other media at its disposal to this end. The ASSESSOR shall approve all public media information prior to its release. The CONTRACTOR will send, via first-class mail, a change of assessment notice/data mailer with the intent of discovering corrections that could be addressed during the informal hearing process.

C. CONDUCT OF COMPANY EMPLOYEES

As a condition of this CONTRACT the CONTRACTOR'S employees shall at all times treat the residents, employees, and taxpayers of the TOWN with respect and courtesy. The CONTRACTOR shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision.

D. RECORDS

1. GENERAL PROVISIONS

The CONTRACTOR shall provide all property record cards, computer supplies, other supplies, equipment, forms, literature and papers to be used in this project at no additional cost to the TOWN. All forms shall be subject to approval by the ASSESSOR as to format, design, content, shape, size, color, quality, and quantity and shall be further subject to the approval of the Secretary of the Office of Policy and Management as may be required by Connecticut General Statutes.

2. CAMA REQUIREMENTS

The TOWN is currently licensed to utilize the EQUALITY CAMA Software. CONTRACTORS are required to use this software to perform this revaluation project. CONTRACTORS must define their prior knowledge and experience using the EQUALITY CAMA software and must include within their proposal any/all costs associated with this project in order to have a professional relationship with EQUALITY throughout the duration of this project. The contractor must obtain proper licensing from EQUALITY, Microsoft SQL, etc., and is solely responsible for any/all costs associated with using these software programs off-site.

3. DATA INTEGRITY

The CONTRACTOR is responsible for keeping the Revaluation Database and the TOWNs database in sync in regards to changes made in the TOWN database, including but not limited to data collected during the PROJECT, Sales, Permits, and any changes which are TOWN database as part of their normal day to day work outside of the PROJECT.

4. RECORDS ARE TOWN PROPERTY

The original or a copy of all records and computations including machine-readable databases made by the CONTRACTOR in connection with any appraisal of property in the TOWN shall, at all times, be the property of the TOWN and upon completion of the PROJECT or termination of this CONTRACT by the TOWN shall be left in good order in the custody of the ASSESSOR. Such records and computations shall include not be limited to: ASSESSOR'S maps, land value maps, cost investigations and schedules, data collection forms, listing cards, property record cards with property valuations and sketches, capitalization rate effective date, sales data, depreciation tables, computations of land and/or building values, all letters of memoranda to individuals or groups explaining methods used in appraisals, operating statements of income properties, duplicate notices of valuation changes and database of all property records, CAMA systems, and integration with the administrative system.

5. ASSESSOR'S RECORDS

The CONTRACTOR shall use a system approved by the ASSESSOR for the accurate accounting of all records and maps, which may be taken from the ASSESSOR'S office in conjunction with this PROJECT. All such records and maps shall be returned immediately following their use. None of the ASSESSOR'S records shall be taken outside of the corporate limits of the TOWN without prior permission of the ASSESSOR.

6. PROPERTY RECORD CARDS (STREET CARDS)

The CONTRACTOR shall complete Property Record Cards, commonly referred to as "Street Cards" and file in alphabetical street order. These cards shall contain all manner of information affecting value, including but not limited to, information as to location of property, classification as to usage, owner of records, source of title, size, shape, and physical characteristics of land, with the breakdown in acreage, along with the unit of value applicable to each public utility, public improvements and zoning regulations in effect as of the assessment date. All physical improvements shall be listed giving all interior and exterior construction details. Quality of construction, age, condition, replacement values, and percent of physical, functional, and economic depreciation, depreciated values, fair market value, and assessment value will be shown. The CONTRACTOR shall review all comments listed on the field card and add or retain all pertinent information and delete non-essential data relative to the property. A computer-generated sketch of ALL buildings with the appropriate scale of such sketch along with an accompanying photograph shall also be shown on these cards.

E. ASSESSMENT NOTICES

At the close of the revaluation a notice shall be sent, at the CONTRACTOR'S expense, by first-class mail to each property owner of record setting forth the value that has been placed upon the property identified in the notice, prepared in duplicate and in conformity with the Connecticut General Statutes. The CONTRACTOR will provide the needed information for the notice. Also enclosed with such notice shall be information specifying the dates, times, and places of the informational public hearings. Such notices shall be subject to approval by the ASSESSOR.

F. INFORMAL PUBLIC HEARINGS

At a time, mutually agreeable to the ASSESSOR and CONTRACTOR, but not later than December 15, 2023, following completion of all review work by the ASSESSOR and the CONTRACTOR, the CONTRACTOR shall hold public hearings so that property owners or their legal representatives may appear at specified times to discuss with qualified members of the CONTRACTOR'S staff, the valuations of their property. The CONTRACTOR'S personnel shall explain the manner and methods used to arrive at the new value.

The CONTRACTOR shall perform all Informal Hearings via Telephone or Online Hearing Form. The CONTRACTOR, in conjunction with the ASSESSOR, shall schedule a sufficient number of hearings and provide sufficient personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer or their legal representative shall be given consideration and adjustments shall be made where warranted.

The CONTRACTOR shall keep records on a form approved by the ASSESSOR of all those owners that requested a hearing and the result of that hearing. A copy of those records shall be given to the ASSESSOR.

The CONTRACTOR shall be responsible for sending notices, by First Class mail at the CONTRACTOR'S expense, to each taxpayer or his or her legal representative who appears at these hearings seeking a review of valuation. Such notice shall include the original valuation determined by the CONTRACTOR and any adjusted valuation as deemed appropriate based on any information received at such hearing.

G. BOARD OF ASSESSMENT APPEALS

The CONTRACTOR shall have the project supervisor available for two (2) hours of training sessions with the Board of Assessment Appeals prior to the Board's hearings relative to the October 1, 2023, Grand List. After the completion of the duties of the Board of Assessment Appeals, such availability and attendance shall not be required to assist in the settlement of complaints and/or to explain the valuation changes. The CONTRACTOR shall enter all changes made by the Board of Assessment Appeals to the valuation file and generate new street cards and summary reports for the ASSESSOR.

H. LITIGATION

In the event of a court appeal, the CONTRACTOR shall furnish, at its sole cost, a maximum of 5 (five) days, as required by the ASSESSOR, a competent witness or witnesses, approved by the ASSESSOR, to defend the valuation of the properties appraised. It is understood that the CONTRACTOR shall furnish said witness or witnesses on any court action instituted on the October 1, 2023. Grand List assessment. Parties other than the TOWN shall not hold the CONTRACTOR responsible for any assessment changed from the original valuation figure.

I. INFORMATION

1. INFORMATION TO THE TOWN

The CONTRACTOR shall give to the ASSESSOR any and all information requested pertaining to the PROJECT for a period of two (2) years after completion of the duties of the Board of Assessment Appeals on the October 1, 2023 Grand List without any additional cost to the TOWN.

2. WORK SCHEDULE

Throughout the appraisal process the CONTRACTOR shall satisfy all requests made by the TOWN for information as to the CONTRACTOR'S planned work schedule for the PROJECT, personnel employed on the PROJECT, appraisal methods, and procedures utilized, and the status of the work. Written monthly status reports are required to be filed with the ASSESSOR throughout the duration of the PROJECT.

J. BUILDING COST SCHEDULES

1. GENERAL

The CONTRACTOR shall prepare for usage in the program as hereinafter specified all building cost schedules. These schedules will reflect the unit-in-place method based upon the square foot area of the building as applicable. These schedules shall be used in computing the replacement cost for all residential, commercial, industrial, public utility, and agricultural construction in the TOWN. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees, and all other direct and indirect construction costs. Before final acceptance testing against known sales shall be used to verify these costs. The ASSESSOR, before adoption and usage, shall approve all finalized schedules by the CONTRACTOR.

2. TYPES OF COST SCHEDULES

a. Residential

Residential cost schedules shall include various classifications, types, models, and story heights on a per square foot basis normally associated with residential buildings. The schedule shall be flexible with a special section reflecting the various additions and deductions for construction components from the base specifications along with prices for different types of heating systems, bathrooms, porches, breezeways, and finished basements, attached, detached, and basement garages. Schedules for other building improvements usually found on residential properties including, but not limited to, in-ground swimming pools, barns, sheds, tennis courts, gazebos, and hot tubs will be valued.

b. Commercial

Commercial building cost schedules shall be prepared in unit costs of materials in place and charted on a per square foot basis and shall be prepared for various story heights and contain all the additions and deductions for construction components from base specifications.

c. Industrial and Special Structures

Cost schedules for industrial and special purpose structures shall be prepared in unit costs of materials in place and charted on a per square foot basis and shall contain all the additions and deductions for construction components from base specifications.

d. Farm

Cost schedules for farm structures shall be prepared for square foot costs for various types of farm buildings including but not limited to barns, sheds and coops.

A recognized valuation publication company such as Marshall and Swift, Means, etc. must support cost schedules for the aforementioned.

3. DEPRECIATION SCHEDULES

Depreciation schedules or methods to be used in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of buildings according to classification. These schedules or methods shall cover residential, commercial, industrial, farm, and special-use buildings subject to the approval of the ASSESSOR.

4. SCHEDULES FOR THE TOWN

The CONTRACTOR shall supply and leave for the TOWN no less than three (3) copies of all of the above-required building cost and depreciation schedules for the TOWN'S usage. One (1) copy of which shall be turned over to the ASSESSOR upon approval of the schedules.

VIII. APPRAISAL SPECIFICATIONS

A. APPRAISAL OF LAND

The CONTRACTOR shall appraise all the following land classifications within the TOWN: residential, commercial, industrial, agricultural, special use, public utility, vacant and unimproved.

1. LAND VALUE STUDY

Land shall be valued on the basis of an analysis of all sales data occurring during the two-year period prior to October 1, 2023, or such other reasonable period of time deemed necessary by the ASSESSOR. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the ASSESSOR. The CONTRACTOR shall make a careful investigation of this data and shall consult owners, realtors,

banks, and other sources for information relative to sales of properties within the TOWN. All factors affecting the final values of land shall be considered such as location, zoning, utilities, size, vacancy, easements, right-of-ways, form of ownership, non-conforming uses, and zoning variances.

2. LAND VALUE UNIT

The CONTRACTOR shall prepare land units by acreage that accurately reflect the fair market value for the appraised land.

3. LAND VALUE MAP

The CONTRACTOR shall delineate all land value units in acreage and base all values on either neighborhood or specific market areas as identified by the ASSESSOR. All applicable maps for this process will be provided by the TOWN to the CONTRACTOR and returned to the TOWN prior to the completion of the PROJECT.

4. NEIGHBORHOOD/SPECIFIC MARKET AREA DELINEATION

After consideration of the environmental, economic, and social characteristics of the TOWN, the CONTRACTOR shall with the cooperation and approval of the ASSESSOR delineate “neighborhood or specific market area” units within the TOWN. Each unit will, in the CONTRACTOR’S opinion, exhibit homogeneous characteristics. Each unit shall be assigned a separate identification code, which will be used for valuation. These neighborhood/market codes shall be recorded and maintained on all property record cards and the computer database.

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES

The **CONTRACTOR** shall inspect all parcels listed in the Section Titled, **“REVALUATION INSPECTION REQUIREMENTS”**.

1. **DATA MAILER as required in “Revaluation Inspection Requirements”—ONLINE**

The CONTRACTOR shall at their own expense prepare and send out a mailer to the Owner of each parcel of Residential and Condominium property within the TOWN. The data mailer will explain the purpose and content of the mailer. If owners find any information about the property to be incorrect, they will be instructed to return the data mailer with the corrected information to the CONTRACTOR.

The format and content of the data mailer shall be subject to the approval of the ASSESSOR. The data mailers shall include, but not be limited to the following information:

Total Living Area	Number of Bathrooms
Basement Area	Number of Kitchens
Finished Basement	Heating System
Year Built	Heating Fuel
Building Style	Central Air Conditioning
Total Number of Rooms	Outbuildings
Number of Bedrooms	In-Ground Pool / Gunite or Liner
Number of Fireplaces	Other Features

The CONTRACTOR shall be responsible for making any corrections to the revaluation CAMA database as a result of the returned data mailers. The CONTRACTOR shall provide the ASSESSOR with the original returned data.

DATA MAILER QUALITY CONTROL PLAN

The CONTRACTOR must work with the ASSESSOR in developing a Data Mailer Quality Control Plan.

The data mailer process must have the ability to track multiple mailings, responses to the mailings, and additional notifications. Data mailers need to be barcoded and scanned into the CAMA system.

2. EXTERIOR INSPECTIONS as required in “Revaluation Inspection Requirements”

a. The inspector will review and verify the structures to the sketch and components on the field card. The inspector will also make note of the condition of the structures to assist in the review process.

b. An outline sketch, prepared to scale, shall be made on-site for all new structures.

c. Physical data of the parcel shall be recorded on the data collection form at the site of physical characteristics affecting value.

3. INTERIOR INSPECTIONS as required in “Revaluation Inspection Requirements”

a. The data collector shall have each interior inspection verified, including the date of the inspection, by having an adult owner or resident of each building or dwelling unit sign the data collection form.

b. When entrance to a building for an inspection is refused, the data collector shall make note of the fact and notify the ASSESSOR of the fact in writing, giving the facts as to the time of the visit and if possible, the name of the party refusing entrance and other pertinent information. The ASSESSOR shall review the situation and if they shall be unable to gain cooperation of the party involved, they shall so notify the CONTRACTOR, and the CONTRACTOR shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and make adequate notations of the lack of cooperation, and the manner of arriving at a value, conspicuously on the property record card.

d. The data collection form shall indicate the initials of the data collector and date(s) of the inspection(s).

4. REVIEW as required in “Revaluation Inspection Requirements”

All property information shall be reviewed by the CONTRACTOR’S personnel that are qualified as reviewers as previously prescribed in these specifications.

The properties shall be reviewed for classification and condition to assure that their value is correlated to comparable properties and coded as such in CAMA system. CAMA system must indicate the date review was performed.

5. VALUATION

Pricing and valuations of all buildings and structures must reflect the fair market value as of October 1, 2023, and shall be done from and in accordance with the previously approved manuals and schedules.

The final valuation shall be the fair market value of the structures plus the fair market value of the land. In arriving at the fair market value of the structures, replacement cost less depreciation from all causes may be considered along with other factors affecting the value of the property, all of which shall be noted on the property record card.

C. APPRAISAL OF COMMERCIAL, INDUSTRIAL, PUBLIC UTILITY, AND SPECIAL PURPOSE PROPERTIES.

1. GENERAL

The CONTRACTOR shall inspect all parcels of which a Sales or Permit has occurred during the previously stated time frames. Commercial, industrial, public utility, and special purpose buildings shall be classified, priced, and reviewed in the same manner as residential properties as set forth previously in these specifications. The dimensions of all buildings shall also include the ceiling height for each story, which shall be recorded on the property record card.

2. DESCRIPTION

These buildings shall be identified and described as component parts of construction, size, area, usage, and present occupancy on the property record card.

3. INCOME APPROACH

Income and expense data gathered by the TOWN shall be utilized by the CONTRACTOR for income-producing, and, where appropriate, owner-occupied properties. Any income and expense data including OPM form number M-58 with accompanying summary reports and rent schedules shall become property of the TOWN. All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Connecticut General Statutes Section 1-210 (formerly 1-19) Access to Public Records; Exempt Records of the Freedom of Information Act. From these returns and other data sources, such as field investigations and interviews, the CONTRACTOR will establish market or economic rent and expenses for income-producing properties. The CONTRACTOR shall also develop capitalization rates by investigating sales and income data. Rates shall be established for the various classes of property and checked by bankers, investors, and appraisers to ensure their accuracy. When the rates and methods have been approved by the ASSESSOR, the CONTRACTOR shall perform the income approach using both actual and economic income and expenses. The CONTRACTOR shall be responsible for entering all income data into the system.

4. YARD (SITE) IMPROVEMENTS

All yard (site) improvements shall be listed and valued separately on the property record card.

5. FIXED EQUIPMENT

All fixed machinery and equipment serving a building and taxable as real estate shall be listed on that building's property record card and priced in accordance with procedures as outlined in the applicable price schedule. If a question arises whether certain machinery or equipment is taxable as real estate, the CONTRACTOR shall bring the question to the attention of the ASSESSOR and be bound by his or her determination.

6. COMMERCIAL REVIEW

All final reviews and inspections shall be made in the same manner and for the same purpose as prescribed for residential properties. The reviewer shall be completely trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility, or special purpose building for which he or she is responsible.

D. QUALITY CONTROL AND CHECKS

1. FIELD CHECKS

The ASSESSOR shall perform random spot checks in the field with or without the appropriate PROJECT supervisor.

1. BUILDING PERMITS

The CONTRACTOR shall provide the ASSESSOR with all completed building permits that were supplied by the TOWN on a regular basis based on the schedule outlined above. Completed permits shall be data entered by the CONTRACTOR.

3. SALES ANALYSIS—ONLINE

Sales analyses of properties shall be performed as a means of substantiating the values derived. These analyses shall be done on the aggregate of all residential properties and on each of the neighborhoods/market areas previously delineated. The sales analyses shall include, at a minimum, sales ratios and coefficients of variance and dispersion. Any additional requests for sales analyses by the ASSESSOR shall also be performed. The CONTRACTOR will send via first class mail a sales verification letter to all new property owners from October 1, 2022, to October 1, 2023. The letter will include a self-addressed stamped envelope for the convenience of the property owner. The CONTRACTOR shall put a sales comparison approach on each property record card.

4. PRELIMINARY TOWN ACCEPTANCE

Prior to the mailing of the assessment notice/data mailers, the PROJECT manager will review the final values with the ASSESSOR. If deemed by the ASSESSOR to be unacceptable the values will be corrected or revised by the CONTRACTOR. The final judgment on all values will be with the ASSESSOR.

VII. RESPONSIBILITIES OF THE TOWN

A. NATURE OF SERVICE

It is clearly understood and agreed that the services rendered by the CONTRACTOR are in the nature of assistance to the ASSESSOR and all decisions as to proper valuation shall rest with the ASSESSOR.

B. COOPERATION

The ASSESSOR, TOWN, and its employees will cooperate with and render all reasonable assistance to the CONTRACTOR and its employees.

C. ITEMS FURNISHED BY THE TOWN

The TOWN shall furnish the following:

1. MAPS

The TOWN shall furnish one (1) set of the most up-to-date ASSESSOR maps that are currently available showing streets, property lines, and boundaries.

2. LAND DIMENSIONS

The TOWN will make available to the CONTRACTOR the total acreage of all pieces of property as found on the property record cards.

3. EXISTING PROPERTY RECORD CARDS

The TOWN will make available the present property record cards and present databases for use by the CONTRACTOR. The CONTRACTOR, at its own expense, will make copies of the existing street cards.

4. PROPERTY TRANSFERS

The TOWN will provide the CONTRACTOR with copies of Sales and Transfers on a timely basis to adhere to the schedule. The Town shall notify the CONTRACTOR on a regular basis of property splits and transfers occurring after the initial creation of the revaluation database by the CONTRACTOR. The CONTRACTOR shall update the revaluation database as necessary. regular basis to adhere to the schedule.

5. BUILDING PERMITS

The TOWN shall provide the CONTRACTOR with copies of building permits from the duration of the PROJECT. The ASSESSOR will provide the permits on a timely basis to adhere to the schedule. Before the PROJECT begins, the ASSESSOR will have all permits prior to the contractual dates updated in regards, to Status, estimated completion dates, and fieldwork collected and entered. The CONTRACTOR is not responsible for Permits outside of the specified time frames.

6. INCOME AND EXPENSE FORMS

The TOWN shall make available all copies of the Income and Expense information (Form M-58) received by the TOWN for the 2021, and 2022, filing period. All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section i-19 (Freedom of Information) of the Connecticut General Statutes.

7. SIGNING OF COMMUNICATIONS

The ASSESSOR shall sign all communications to be mailed by the CONTRACTOR at their own expense for the purpose of contacting a property owner for an inspection of the property.

8. MAILING ADDRESSES

The TOWN shall make available through the ASSESSOR'S Office the current mailing address and other relative data that exists on the CAMA program for all property owners.

9. OFFICE SPACE

Office space shall be provided by the TOWN for the CONTRACTOR to manage daily activities.

VIII. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR

A. RECORDS

Appraisals shall be delivered and turned over for review in accordance with a schedule agreeable to the ASSESSOR. All appraisals of buildings either complete or under construction shall be finalized as of October 13, 2023. Final inspections and reviews shall take into consideration any known or apparent change in the individual property since they were first inspected. All properties shall be appraised as of October 1, 2023 All completed and/or corrected records shall be turned over to the ASSESSOR as of January 31, 2024.

Information and records shall not be made public until after the informal hearings, except to the extent public access may be compulsory under the provisions of applicable law.

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the ASSESSOR. On a monthly basis, the PROJECT manager shall meet with the ASSESSOR to discuss the progress and various other details of the PROJECT.

C. PERFORMANCE-BASED REVALUATION CERTIFICATION

The CONTRACTOR shall perform the required statistical analyses and complete the Performance-Based Revaluation Certification Form as prescribed by the Secretary of Office of Policy and Management. If the revaluation is not in compliance with the required statistical analyses the CONTRACTOR shall make such adjustments to the appraisal of the properties to ensure compliance with said requirements.