

TOWN OF LEBANON, CONNECTICUT

REQUEST FOR PROPOSALS

RFP#2023-071

**REAPPRAISAL AND REVALUATION OF ALL TAXABLE AND EXEMPT REAL
PROPERTY**

FOR THE OCTOBER 1, 2023 GRAND LIST



DATE ISSUED: JULY 1, 2022

TIME AND DATE DUE: 2:00 PM, JULY 22, 2022

**EMMA SOUSA, CCMA I, ASSESSOR
579 EXETER ROAD
LEBANON, CONNECTICUT 06249**

TABLE OF CONTENTS

Request for Proposals

I. Specifications for Revaluation Services

A.	Definitions	4
B.	Minimum Specifications	4
C.	Evaluation Criteria	5
D.	Scope of Reappraisal and Revaluation	6
E.	Work Plan	8
F.	Completion Date & Time Schedule	8
G.	General Conditions	10
H.	Protection of the TOWN	10
I.	Changes and Subletting of Contract	12
J.	Assessment Date	13
K.	Delays	13
L.	Payment Schedule	13
M.	Responsibilities of the CONTRACTOR	14
N.	Responsibilities of the TOWN	16
O.	Transmittal of Deliverables to the ASSESSOR	18

Attachment A - Fee Proposal	19
-----------------------------	----

Attachment B - Revaluation Services Options	21
---	----

Attachment C – TOWN Data /Sales & Sales Ratio Information	22
---	----

**TOWN OF LEBANON
REQUEST FOR PROPOSALS
REAPPRAISAL AND REVALUATION OF ALL TAXABLE AND EXEMPT REAL PROPERTY
FOR THE OCTOBER 1, 2023 GRAND LIST**

The TOWN of LEBANON is accepting proposals for the Revaluation of all Real Property in the TOWN, effective October 1, 2023. Those interested in providing the Revaluation Services as set forth in the TOWN's specifications are invited to submit their proposals to the FIRST SELECTMAN'S OFFICE, TOWN of LEBANON, 579 Exeter Road, LEBANON, CT 06249, no later than **2:00 pm local time on July 22, 2022** at which time the proposals received will be opened publicly and read aloud. Proposals submitted after this time will not be accepted. Each proposer must submit a sealed envelope, the outside of which must be clearly marked "RFP#2023-071 – 2023 REAPPRAISAL AND REVALUATION OF ALL TAXABLE AND EXEMPT REAL PROPERTY ENCLOSED" and include the proposer's company name and address.

Any questions concerning this bid must be made in writing by contacting Emma Sousa, TOWN of LEBANON Assessor, at esousa@lebanonct.gov

The CONTRACTOR must submit a work plan that addresses all tasks that must be performed for the successful completion of the revaluation program. This work plan must adhere to the deadlines that have been established in the RFP. The CONTRACTOR must identify the starting dates of each task and the resources (man-hours) that will be allocated for each work activity. **The Work Plan must be submitted with the fee proposal and will be considered one of the selection criteria in awarding the contract.**

SPECIFICATIONS FOR REVALUATION SERVICES

A. DEFINITIONS

ASSESSOR	"ASSESSOR" shall mean the duly appointed ASSESSOR of the TOWN of LEBANON, Connecticut.
CONTRACTOR	"CONTRACTOR" shall mean the certified revaluation company who shall perform this PROJECT.
PROJECT	"PROJECT" shall mean the TOWN-wide revaluation of all real property within the corporate limits of LEBANON, Connecticut for assessment purposes effective October 1, 2023.
TOWN	The word "TOWN" shall hereinafter mean the TOWN of LEBANON, Connecticut.
QUESTIONNAIRE	"QUESTIONNAIRE" is defined in C.G.S. Sec. 12-62(a)(4). QUESTIONNAIRES are also called "data mailers" in the revaluation industry therefore "data mailers" and "QUESTIONNAIRES" shall have the same meaning and must contain the sketch.
FULL INTERIOR INSPECTION	"FULL INSPECTION" means "fully inspect" as defined in C.G.S. Sec. 12-62(a)(3).

B. MINIMUM SPECIFICATIONS

- i. To be considered for selection, each interested firm, or individual, must be a certified revaluation company in accordance with Connecticut General Statutes 12-2c, and must have held this certification for a minimum of five years.
- ii. All personnel to be assigned to this PROJECT shall be subject to the approval of the ASSESSOR and shall be certified to perform the revaluation duties in which they are assigned. CONTRACTOR personnel serve at the pleasure of the ASSESSOR and if, at any time, the ASSESSOR deems it to be in the best interest of the TOWN/PROJECT for any CONTRACTOR personnel to be removed from this PROJECT, and/or replaced, the CONTRACTOR shall immediately remove, and/or replace, said personnel.
- iii. The PROJECT Manager/Supervisor, the Reviewer, and the Commercial Appraiser must personally be identified in the contract as the actual staff who will be assigned to this PROJECT. Once the Contract has been executed, the CONTRACTOR shall ensure that these assigned personnel are not over allocated during the 2023 revaluation cycle and have the allotted time earmarked for the successful completion of this PROJECT. Only a physical limitation, injury, no longer being employed by the CONTRACTOR, or the ASSESSOR's request will be considered acceptable for replacing the assigned personnel.

In addition, the positions identified below must meet the following additional requirements:

PROJECT Manager/Supervisor: must have not less than ten (10) years of practical appraisal experience in the appraisal of commercial, industrial, apartment, farm, and residential type properties of which no less than five (5) years have been working as a PROJECT Manager/Supervisor in mass appraisal.

Commercial Appraiser: shall have not less than fifteen (15) years of practical appraisal experience, of which at least ten (10) years have been in the valuation of commercial, industrial and apartments. They must have a minimum of five (5) years of experience in mass appraisal in which they were responsible for the valuation of commercial, industrial and apartments.

Reviewers and Appraisers: shall have not less than five (5) years of practical appraisal experience in the appraisal of the particular type of property for which they are responsible. Three (3) years of this experience shall have been in the mass appraisal field and shall have occurred within the past five (5) years.

Data Collectors: shall have not less than three (2) years of experience as a Data Collector which have occurred in the last ten (10) years.

No CONTRACTOR staff may be used on this PROJECT unless they meet the requirements listed above or the CONTRACTOR has received an exception from the Assessor for a specific employee.

C. **EVALUATION CRITERIA**

- i. Accuracy, overall quality, thoroughness, and responsiveness to the TOWN's requirements.
- ii. Demonstrated understanding of the Scope of Services.
- iii. The qualifications and municipal experience of the firm and the designated account executive and other key personnel to be assigned to the PROJECT.
- iv. Demonstrated successful performance on other municipal PROJECTs.
- v. Familiarity and experience with the Connecticut real estate market.
- vi. Familiarity and experience utilizing the CAMA software that will be utilized by the TOWN.
- vii. Demonstrated flexibility, efficiency, and timeliness in providing day to day service to municipal clients.

D. **SCOPE OF REAPPRAISAL AND REVALUATION**

i. This PROJECT includes the complete reappraisal and revaluation of all real property within the corporate limits of LEBANON, Connecticut effective as of October 1, 2023. (See attachment for breakdown).

ii. This Town-wide revaluation is what is commonly referred to as a “full measure and list” and the CONTRACTOR is required to send QUESTIONNAIRES to all Property Owners of improved residential and commercial property. For each Property Owner in which a QUESTIONNAIRE is not obtained, or satisfactory verification of data has not been obtained, the CONTRACTOR is required to complete FULL INSPECTIONS.

1. For properties requiring FULL INSPECTION, data collectors shall make an initial attempt to perform the FULL INTERIOR INSPECTION.
2. In the event they are not able to gain access on their first attempt the Data Collector shall leave a door hanger indicating that the CONTRACTOR attempted to inspect the property and provide a phone number in which the property owner can call to set up an appointment for an inspection at a later date.
3. The data collector is required to make at least one (1) additional call back of which must take place after 5:30 p.m. or on a Saturday. Call backs may NOT be on the same day as the initial attempt.
4. ALL attempts to gain entry must be documented on the “Visit History” section of the property record card indicating the outcome of each attempt.
5. If the CONTRACTOR has made both the initial and call back attempts and still was unable to gain access to the property, the CONTRACTOR shall send a written letter via USPS requesting that the property owner call the CONTRACTOR to set up a date for the inspection.
6. For any property owner who verbally refuses to allow the CONTRACTOR entry to their property, the CONTRACTOR is no longer required to attempt any additional call backs. However, the CONTRACTOR must provide the ASSESSOR with a list of every property owner who refused the full interior inspection process on a weekly basis. Additionally, the CONTRACTOR shall document the Visit History indicating that the property owner refused the inspection process.
7. For any property where the CONTRACTOR chose not to attempt to inspect because of a sign posted by the property owner, the CONTRACTOR shall send a written letter via USPS requesting that the property owner call the CONTRACTOR to set up a date for the inspection. The CONTRACTOR must document the visit history for each property in which they choose not to inspect due to a posted sign and provide the ASSESSOR with a written list on a weekly basis of all such properties.

i. Prior to assigning the final values, the CONTRACTOR, is required to perform a drive by inspection of every property in TOWN in order to complete the Field Review phase of the PROJECT. In order to preserve continuity, the CONTRACTOR will assign one Review Appraiser to Review the entire TOWN. Both the TOWN and the CONTRACTOR mutually understand and agree that the ASSESSOR will accompany the

Review appraiser on all Field Review. The Field Reviewer shall:

1. Schedule all field review at least four (4) weeks in advance on dates that are mutually convenient for both the ASSESSOR and the Reviewer.
 2. Review each property (Sketch, Photo, and Outbuildings) for accuracy as compared to that of the data on the current property record card.
 3. During review, each property that is discovered that does not appear to be accurately reflected on the property record card, the reviewer has the options to:
 - a. Make the correction(s) that are a simple & quick fix.
 - b. Flag the property and send a data collector out to follow-up with a more in-depth inspection for each property that is flagged for an inspection, the CONTRACTOR will provide the ASSESSOR with a copy of each inspection report, flagged from Review, no later than October 1, 2023.
 4. Review the property and assign the appropriate condition and grade factors for all improvements and land adjustments as compared to that of the sale properties.
 5. Review the notes on the PRC as well as the sales history, permit data and close out permits as necessary.
 6. Work cooperatively with the ASSESSOR and explain the reasoning and methodology behind their assignment grade & condition factors as well as land adjustments.
 7. Document the "Visit History" section of the property record card for each property with the "exact date" in which the Review Appraiser completed their field review.
- ii. The CONTRACTOR shall use the TOWN of LEBANON's existing CAMA system, Vision Government Solutions, Inc. (VGSI), formerly known as Vision Appraisal Technology, Version 8. The TOWN will provide access, either remotely or on site, to the CAMA system by using one dedicated licenses provided for in the TOWN's contract with VGSI.
- iii. The TOWN shall make available copies of all building permits issued during the course of the revaluation PROJECT up to October 1, 2023. This will also include any permits issued prior to 10/1/2022 that were not 100% complete on 10/1/2022. The CONTRACTOR shall perform inspections of all building permit work including inspecting, updating the property record card, sketch, visit history, take, and upload a new photo, and revalue accordingly. Copies of all field inspection reports for building permit properties shall be delivered to the ASSESSOR no later than October 1, 2023.
- iv. Perform all services and furnish all records, materials, and forms required to complete the revaluation PROJECT in accordance with Connecticut General Statutes.
- v. The values to be determined shall be the full fair market value 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 Practice in effect at the time of the appraisal.
- vi. The Proposal must include specific costs for each phase of the PROJECT.

E. **WORK PLAN**

The CONTRACTOR must submit a work plan that addresses all tasks that must be performed for the successful completion of the revaluation program. This work plan must adhere to the deadlines that have been established in Section F below. The CONTRACTOR must identify the starting dates of each task and the resources (estimated man-hours) that will be allocated for each work activity. **The Work Plan must be submitted with the fee proposal and will be considered one of the selection criteria in awarding the contract.**

F. **COMPLETION DATE, TIMELINE SCHEDULE, AND LIQUIDATED DAMAGES**

- i. Both the TOWN and the Bidder/CONTRACTOR recognize, understand, and agree that time is of the essence with this PROJECT and the TOWN will suffer financial loss if each and every phase of the contract is not completed by its deadline as specified in this contract. The Bidder/CONTRACTOR agrees that there will be no exceptions to the individual deadlines unless such deadline extension was agreed to by the ASSESSOR in writing. The Bidder/CONTRACTOR agrees that all extensions made by the TOWN, or ASSESSOR, shall be made in writing otherwise they are deemed ineffective and non-existent.
- ii. The Bidder/CONTRACTOR recognizes and agrees that there would be additional delays, expense, and difficulties involved in proving the actual losses suffered by the TOWN in the event that a deadline was missed. Therefore, instead of requiring any such proof, or causing any further delays, the Bidder/CONTRACTOR agrees that as Liquidated Damages (but not as a penalty) for any delay of the two (2) dates identified in items in Section F, v. "j" and "q", the Bidder/CONTRACTOR shall pay the TOWN five hundred dollars (\$500) for each day that begins after the expiration of any such deadline, until such time that the ASSESSOR has determined in writing that the Bidder/CONTRACTOR's obligations relative to such delay have been fully met/completed. This amount may not be altered.
- iii. If after an initial delay has occurred, the Bidder/CONTRACTOR neglects, refuses, or fails to meet any subsequent completion deadlines as specified and required in this contract, the Bidder/CONTRACTOR shall pay the TOWN Liquidated Damages for any delay of two (2) dates identified in items in Section F, v. "j" and "q", in the amount of five hundred dollars (\$500) for each day that begins after the expiration of any such subsequent deadline. These Liquidated Damages will apply to any termination for cause or convenience, with or without cause, and without prejudice to any other right or remedy of the TOWN.
- iv. The Bidder/CONTRACTOR shall commence the revaluation work not later than October 15, 2022 and shall continue uninterrupted in a diligent fashion so as to ensure completion within the schedule of completion dates hereinafter set forth below.
- v. **COMPLETION DATES:**
 1. The following PROJECTs, tasks, phases of the revaluation must be completed in accordance with the following schedule:
 - a. Commence PROJECT, meet with ASSESSOR at TOWN Hall, pick up sales data from last two months, and discuss the PROJECT, goals, timelines/deadlines, etc. no later than October 15, 2022.

- b. Complete and deliver to the ASSESSOR proposed neighborhood definitions and values by May 1, 2023.
- c. Complete and deliver to the ASSESSOR land study and land value map by May 1, 2023.
- d. Complete and deliver to the ASSESSOR study of market rents, expenses, and capitalization factors by July 10, 2023.
- e. Complete and deliver to the ASSESSOR all valuation tables for use in CAMA modeling by July 30, 2023.
- f. Complete and deliver to the ASSESSOR all preliminary residential values by July 30, 2023.
- g. Complete and deliver to the ASSESSOR the analysis of all income and expense statements by August 15, 2023.
- h. Complete the field review of all parcels by August 15, 2023 and deliver updated cards/database to the ASSESSOR.
- i. Complete and deliver to the ASSESSOR the building cost tables and building cost manual by September 15, 2023.
- j. Complete and deliver to the ASSESSOR all proposed values, for all classes of properties, by September 15, 2023. **(Subject to liquidated damages in accordance with Sec. Fii and Fiii)**
- k. Complete and submit to the ASSESSOR a preliminary Performance Based Revaluation Testing Standards compliance no later than October 10, 2023.
- l. Submit sample "Assessment Change Notices" to the ASSESSOR for review or modification by October 10, 2023.
- m. ASSESSOR completes review of CONTRACTOR work and makes final adjustments for real property no later than November 30, 2023.
- n. CONTRACTOR prints and mails, at CONTRACTOR's expense, "Assessment Change Notices" in compliance with Connecticut State Statutes, Section 12-62(f) by December 2, 2023.
- o. Informal Taxpayer Meetings are to commence no later than December 8, 2023 and end no later than December 22, 2023.
- p. Submit sample "Results from Informal Hearing Notices" to the ASSESSOR for review or modification one week prior to mailing.
- q. Notices with results from Informal Taxpayer Meetings completed to comply with requirements of Connecticut General Statutes, Section 12-62(f) printed and mailed out at the CONTRACTOR's expense, CAMA system updated, and final property record cards completed no later than December 29, 2023. **(Subject to liquidated damages in accordance with Sec. Fii and Fiii)**

- r. Complete and deliver to the ASSESSOR the final Performance Based Revaluation Testing Standards compliance no later than December 30, 2023.
2. The CONTRACTOR agrees that the revaluation supervisor will provide weekly updates via e-mail. An active discussion of the progress, problems, methodology used etc. will take place in a regular and mutually agreeable timeframe. Failure of the CONTRACTOR to meet this requirement will result in a breach of contract and may be subject to written notification requesting termination of the contract.

G. GENERAL CONDITIONS

- i. Background Check.
 - 1. All personnel may be subject to background checks by the LEBANON Resident Trooper. No employee of the CONTRACTOR who has been convicted of a felony will be acceptable to the TOWN. All employees of the CONTRACTOR working within the TOWN limits shall have a valid driver's license.
- ii. Identification.
 - 1. All field personnel shall have visible clip-on identification cards, which shall include an up-to-date photograph, supplied by the CONTRACTOR. In addition, all field personnel shall carry a "Letter of Introduction" signed by the ASSESSOR. All automobiles used by field personnel shall have magnetic signs on both sides of their vehicle that state "LEBANON ASSESSOR's Office" and include the TOWN seal. All vehicles must be registered with the ASSESSOR and LEBANON Resident Trooper giving license number, make, model, year and color.
- iii. Conflict of Interest.
 - 1. No resident of the TOWN or TOWN employee shall be employed by the CONTRACTOR, without the prior approval of the ASSESSOR.

H. PROTECTION OF THE TOWN

- i. Bonding.
 - 1. The CONTRACTOR shall, to secure the faithful performance by the CONTRACTOR of the terms of this contract, furnish to the TOWN a Performance Surety Bond in the amount of the contract; which bond shall be issued by a bonding company licensed to do such business in the State of Connecticut, with a minimum A.M. Best Company rating of "A+/VII". Said bond shall be delivered to the TOWN prior to the commencement of actual work and shall be in a form satisfactory to and approved by the TOWN. It is understood and agreed that upon completion and delivery to the TOWN of the revaluation and its approval by the ASSESSOR and after completion of the duties of the Board of Assessment Appeals, the performance bond shall be reduced to 10% of the value of the contract for the purpose of covering the defense of all appeals taken by taxpayers. The reduced amount of the bond shall remain effective until a final resolution in the courts of any timely appeals taken from the doings of the Board of Assessment Appeals on the list of October 1, 2023.

ii. Insurance.

1. Upon execution of the Contract, and thereafter, no less than fifteen (15) days prior to the expiration date of any insurance policy delivered pursuant to the Contract, the CONTRACTOR shall deliver to the TOWN a certificate(s) of insurance to show compliance with the specifications.
2. Each policy of insurance shall be issued by financially responsible insurers duly licensed to do business in the State of Connecticut. The insurers shall be responsibly acceptable to the TOWN and shall have an A.M. Best Company rating of "A+/VII" or better.
3. Each policy of insurance shall include a waiver of subrogation in favor of the TOWN and shall provide no less than thirty (30) days notice to the TOWN in the event of a cancellation or change in conditions or amounts of coverage.
4. The CONTRACTOR shall, at its own expense, provide and keep in force:
 - a. Workers' Compensation insurance as required by Connecticut state statutes.
 - b. The policy must provide coverage for benefits payable under the Connecticut Workers Compensation Act and include the Voluntary Compensation endorsement.
 - c. 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 a \$2,000,000 aggregate.
 - i. 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 CONTRACTOR must maintain the insurance for a period of two years from the completion of the contract.
 - d. During the term of the contract, CONTRACTOR shall provide Commercial General Liability insurance for bodily injury and property damage. The Commercial General 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, blanket contractual and personal injury. The required limits of liability are:
 - i. \$2,000,000- General Aggregate
 - ii. \$2,000,000- Product-Completed Operations Aggregate
 - iii. \$1,000,000- Each Occurrence
 - e. Automobile Liability insurance shall be written with a Comprehensive Form and include coverage for owned, hired, and non-owned vehicles. The limit for any one accident or loss shall be \$1,000,000.
 - f. Workers Comp and Employer's Liability - the required limits of liability are:
 - i. \$100,000 each accident
 - ii. \$500,000 disease policy

iii. \$100,000 disease accident limit

- g. CONTRACTOR shall save the TOWN harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of the contract.
- h. "The TOWN of LEBANON and Board of Education" are to be named as "Additional Insured". Original, completed certificate of insurance must be presented to the Purchasing and Insurance Coordinator prior to purchase order/contract issuance.

iii. Liquidated Damages.

- 1. As stated in Section F, failure by CONTRACTOR to complete all work prior to the dates specified herein, will require the CONTRACTOR to pay Liquidated Damages in the amount of FIVE HUNDRED DOLLARS (\$500) for each day that begins after said completion deadline.
- 2. Liquidated Damages shall be deducted from the contract price and the TOWN shall notify the CONTRACTOR in writing as to the amount of Liquidated Damages that have been withheld no later than January 5, 2024.
- 3. Delays occasioned by war, strike, explosion, acts of God, or an order of the court or other public authority having jurisdiction over the TOWN of LEBANON are excepted from Liquidated Damages.

I. **CHANGES AND SUBLETTING OF CONTRACT**

i. Changes.

- 1. This Contract must be returned as part of, and attached to, the Bidder/CONTRACTOR's bid submission and the Bidder/CONTRACTOR may not make any changes what so ever to the Contract requirements or terminology without approval of the Assessor. The TOWN has the right to reject any bid that has altered the TOWN's Contract.
- 2. Once the TOWN has awarded the bid and entered into an executed binding agreement with the chosen CONTRACTOR, any changes in these specifications, deadlines, or contract language will be permitted only upon written mutual agreement of the CONTRACTOR and the Assessor.

ii. Subletting.

- 1. The CONTRACTOR shall not assign, transfer or sublet the contract or any interest or part therein, without first receiving written approval from the ASSESSOR. It should be mutually agreed and understood that said consent by the ASSESSOR to sublet any portion of the contract shall in no way release the CONTRACTOR from any responsibility or liability as covered in these specifications and contract.

J. **ASSESSMENT DATE**

- i. The completed appraisals, upon approval of the ASSESSOR, will serve as the basis for assessments effective on the Grand List of October 1, 2023.

K. **DELAYS**

- i. The CONTRACTOR shall not be liable for Liquidated Damages for reasonable delays caused by reasons of war, strike, explosion, acts of God, or an order of court or other public authority having jurisdiction over the TOWN of LEBANON.

L. **PAYMENTSCHEDULE**

- i. Periodic Payments.

- 1. Payments shall be made in the following manner:

- a. 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 work performed by volume, street, and 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 Payment Schedule as shown below.
 - b. The TOWN, upon determination by the ASSESSOR that the certification of the CONTRACTOR concerning work during said period is accurate, will pay to the CONTRACTOR a monthly installment based on the percentage of the total compensation due under the contract equal to the percentage of work certified as having been completed during said period, less ten percent (10%), which is to be retained by the TOWN for payment to the CONTRACTOR at such time that he or she has performed fully and satisfactorily all its obligations, requirements, and litigation under the contract. The retained ten (10%) percent of the contract price is to be paid upon the completion of work of the Board of Assessment Appeals on the October 1, 2023 Grand List in accordance with the provisions of this contract.
 - c. The provision for a reduction of the performance bond to 10% of the contract price is to ensure the defense of any appeals resulting from the revaluation work.

- ii. Fiscal Year Limitations.

- 1. The contract cost shall be paid in the TOWN Fiscal Years ending June 30, 2022 and June 30, 2023 according to the provisions of this section and subject to the appropriation of necessary funds by the TOWN's fiscal authority. The CONTRACTOR shall incur no cost in any fiscal year in excess of that year's annual appropriation plus the balance of prior years' unexpended appropriations.

iii. Stages of Completion.

1. The cost associated with revaluation services should be broken down in the table below:

TASK	%	AMOUNT
PROJECT Supervision		
Residential Valuation		
Residential Measure and List		
Residential Field Review		
Permits		
Commercial/Industrial Valuation		
Commercial/Industrial Measure and List		
Commercial/Industrial Field Review		
Commercial/Industrial Permits		
Data entry & Printing		
Letters, Mailings and notices		
Bonding		

iv. Informal Taxpayer Meetings with the CONTRACTOR

1. Since there is no way to determine, after having received their Notice of Assessment Change, how many Taxpayers will request a Meeting with the CONTRACTOR, the CONTRACTOR must provide a per "Half day" cost for each Informal Taxpayer Meeting that will take place. Upon COMPLETION of all of the Taxpayer Meetings, the CONTRACTOR must deliver all Informal Meeting Notes to the ASSESSOR and shall invoice the TOWN for the agreed upon per "Half day" rate multiplied times the number of actual meetings that took place. Informal hearing must be offered "in-person".

M. **RESPONSIBILITIES OF CONTRACTOR**

i. Good Faith.

The CONTRACTOR shall, in good faith, use its best efforts to assist the ASSESSOR in determining accurate and proper market valuations, and shall not undervalue or overvalue any land, building or other property to avoid or minimize its responsibilities specified herein. It is expected that an open line of communication exists with the ASSESSOR throughout the PROJECT. At least weekly the CONTRACTOR shall speak directly with the ASSESSOR to discuss the progress and various other details for the duration of the PROJECT.

ii. Public Relations.

1. The parties of this revaluation PROJECT recognize that a good public relations program needs to

be planned and completed from the beginning of the PROJECT to inform the public of the TOWN of LEBANON as to the purpose, benefits and procedures of the revaluation program.

2. The CONTRACTOR shall provide reasonable assistance to the ASSESSOR in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs, and property owner groups as a means of establishing understanding and support for the revaluation program and sound assessment administration. The CONTRACTOR shall supply visual aids and other media at its disposal to this end. All public releases shall be approved by the ASSESSOR prior to release.
- iii. Conduct of Company Employees.
1. As a condition of the 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.
- iv. Records are TOWN Property.
1. The original or a copy of all records and computations, including CAMA systems and 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, but not be limited to:
 - i. ASSESSOR's/GIS Maps;
 - ii. Land Value Maps;
 - iii. Materials and Wages, Cost Investigations and Schedules;
 - iv. Data Collection Forms, Listing Cards, Property Record Cards with property valuations and sketches;
 - v. Capitalization Rate Data;
 - vi. Sales Data;
 - vii. Depreciation Tables;
 - viii. Computations of land and/or building values;
 - ix. All letters of memoranda to individuals or groups explaining methods used for appraisals;
 - x. Operating statement of income properties;
 - xi. Duplicated notice of valuation changes;
 - xii. Database of all property records, CAMA system, and integration with administrative and GIS systems.
 2. In addition, throughout the conduct of said revaluation, any criteria, guidelines, price schedules or statement of procedures used in such revaluation by the CONTRACTOR shall be made available by the CONTRACTOR for public inspection in the ASSESSOR's office and shall be available thereafter, all in accordance with Section 12-62(c) of the Connecticut General Statutes.

3. 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 the corporate limits of the TOWN without prior written permission of the ASSESSOR.

v. Information.

The CONTRACTOR shall give to the ASSESSOR any and all information requested pertaining to the PROJECT for a period of one (1) year 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.

vi. Control and Quality Checks.

The CONTRACTOR shall develop QC checks and balances and share the QC plan with the ASSESSOR at the beginning of the project.

vii. Sales Analysis.

Sales analysis of properties shall be performed as a means of supporting the values derived. These analyses shall be done on the aggregate of all residential properties and on each of the neighborhoods 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.

N. **RESPONSIBILITIES OF THE TOWN**

i. 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.

ii. Cooperation.

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

iii. Items Furnished By the TOWN.

The TOWN shall furnish the following:

a. Maps.

- i. The TOWN shall furnish one (1) set of (11X17) the most up-to-date TOWN Tax Maps that are currently available showing streets, and property lines and boundaries.
- ii. The CONTRACTOR will also have access to the TOWN's GIS which is available to the public over the internet.

b. Land Dimensions.

The TOWN will make available lot sizes and total acreage to the CONTRACTOR of all pieces of property where the map or present records fail to disclose measurement or acreage.

c. Zoning.

The TOWN will provide a copy of the current TOWN zoning regulations and a zoning map. The contractor is required to verify that the current and correct zoning information is on each parcel.

d. Existing Property Record on CAMA System.

The TOWN will make available the current CAMA system for all property types available to the CONTRACTOR with the following data: Owner of record, location of property, address of owner, deed references, map and lot reference, age and date of construction of all buildings, sketches, photographs, and lot size or amount of acreage of properties.

e. Property Transfers.

The TOWN shall notify the CONTRACTOR by email, on a weekly 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.

f. Building Permits.

The TOWN shall make available copies of all building permits issued during the course of the revaluation PROJECT up to October 1, 2023. The CONTRACTOR shall perform all building permit work including inspecting, updating the property record card, sketch, visit history, and revalue accordingly.

g. Office Space.

If necessary, the TOWN shall furnish to the CONTRACTOR sufficient office space to carry out the terms of this contract.

h. Obligation to Keep Current.

The TOWN shall continuously and currently update the information specified above.

i. Sales Information.

The TOWN shall continuously and currently provide copies of all sales information available to the TOWN with respect to the transfer of parcels.

O. **TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR**

i. Records.

1. Regular periodic delivery of appraisals, tables, analysis, and other information required by these specifications, as completed, and in accordance with the schedule set forth above, shall be made to the ASSESSOR for his/her review. All appraisals of buildings either complete or under construction, shall be completed as of October 1, 2023. All completed and/or corrected records shall be turned over to the ASSESSOR as of December 21, 2023. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected in order that the final appraisal of property shall be appraised as of October 1, 2023.
2. This information and/or appraisals and records shall not be made public until after the informal hearings, except to the extent public access may be compulsory under provisions of applicable law.
3. It is understood and agreed that the reappraisal of properties covered by this contract shall meet or exceed the standards as outlined in the Connecticut Performance Based Revaluation Standards and Certification of Revaluation performed by towns as required by OPM, shall conform to the procedures and technical requirements of the ASSESSOR and, at least weekly, the CONTRACTOR shall meet with the ASSESSOR to discuss the progress and various other details of the PROJECT.
4. The revaluation of October 1, 2023 shall be performed in accordance with the schedule, as prescribed in accordance with Connecticut State Statutes for updates. Should legislative changes be made, the TOWN and the CONTRACTOR will conform to the State Statutes in effect upon passage of the legislation.

ATTACHMENT A

FEE PROPOSAL

PROJECT: THE COMPLETE REAPPRAISAL AND REVALUATION OF ALL TAXABLE AND EXEMPT REAL PROPERTY, LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF LEBANON, CONNECTICUT, EFFECTIVE OCTOBER 1, 2023.

The undersigned, duly authorized agent for the individual, partnership, corporation or other entity (hereinafter called the respondent) submitting this fee proposal affirms and declares:

1. That this fee proposal is submitted by said respondent with full knowledge and acceptance of the Specifications for Request for Proposal - Revaluation Services.
2. That should this fee proposal be accepted in writing by the TOWN of LEBANON, (hereinafter called the TOWN), said respondent will furnish the services for which this fee proposal is submitted at the dollar amount indicated and in compliance with the provisions of said contract and contract specification.
3. That the respondent or his or her representative has visited the TOWN; is familiar with its geography, general character of residential housing, its commercial and industrial areas; has examined the quality and condition of the ASSESSOR's records; and has met with the ASSESSOR to make himself or herself knowledgeable of those matters and conditions in the TOWN which would influence this fee proposal.
4. That the respondent proposes to furnish the services and materials required to complete the subject PROJECT in accordance with the aforesaid Bid Specifications for the total amount of:

<p>FEE PROPOSAL PRICE IN WORDS:</p> <hr style="border: 0; border-top: 1px solid black; margin-top: 20px;"/>	<p>FEE PROPOSAL PRICE IN FIGURES:</p> <hr style="border: 0; border-top: 1px solid black; margin-top: 20px;"/>
--	--

5. An additional cost of \$_____ will be billed to the TOWN for each half-day scheduled informal hearing.
6. The TOWN reserves the right to reject any, or any part of, or all Fee Proposals; to waive informalities; and to accept the Fee Proposal which the TOWN deems to be in the best interest of the TOWN.

FEE PROPOSAL SIGNATURE PAGE

Please print legibly or type, not valid until signed:

FIRM NAME OF PROPOSER:

MAILING ADDRESS:

BY:

(Signature)

(Date)

PRINTED/TYPED NAME:

TITLE:

TELEPHONE NUMBER:

FAX NUMBER:

EMAIL:

**Kindly deliver 2 (TWO) copies of Fee Proposal and Work Plan to the FIRST SELECTMAN'S
OFFICE, TOWN of LEBANON, 579 Exeter Road, LEBANON, CT 06249, no later than
2:00 p.m. on July 22, 2022.**

ATTACHMENT B

REVALUATION SERVICES OPTIONS, RECOMMENDATIONS, CLARIFICATIONS OR REQUESTS:

[illegible]

ATTACHMENT C

TOWN DATA

The TOWN of LEBANON is contained within 55.21 square miles. The 2020 census indicated the TOWN's population was 7,142. The last revaluation of the TOWN of LEBANON was conducted for the October 1, 2018 Grand List. The ASSESSOR's maps and GIS program can be found here:

<https://www.axisgis.com/lebanonct/>

The approximate composition of the property types in the TOWN of LEBANON is delineated in the following table:

TOWN OF LEBANON 2021 REAL ESTATE ACCOUNTS

<u>TOWN OF LEBANON</u> <u>2021 REAL ESTATE ACCOUNTS</u>			
CODE	# OF ACCTS	DESCRIPTION	GROSS ASSESSMENT
100	3,046	RESIDENTIAL	489,243,161
200	43	COMMERCIAL	14,785,662
300	7	INDUSTRIAL	4,394,760
400	10	PUBLIC UTILITY	1,933,150
500	433	VACANT LAND	12,034,410
600	502	USE ASSESSMENT	5,683,670
700	2	10 MILL FOREST	1,300
800	4	APARTMENTS	1,551,070
	4,047		529,627,183
	116	REAL ESTATE EXEMPT	48,812,040
GRAND TOTAL	4,163		578,439,223