

# TOWN OF ELLINGTON, CONNECTICUT

## REQUEST FOR PROPOSAL

### REAPPRAISAL AND REVALUATION OF REAL PROPERTY

### FOR 2015 GRAND LIST



DATE ISSUED: AUGUST 11, 2014  
DATE DUE: SEPTEMBER 8, 2014

CINDY ROMAN, ASSESSOR  
MAURICE W. BLANCHETTE, FIRST SELECTMAN  
55 MAIN ST., ELLINGTON, CONNECTICUT 06029

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**REQUEST FOR PROPOSAL**

PROJECT: THE COMPLETE REAPPRAISAL AND REVALUATION OF ALL REAL PROPERTY LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF ELLINGTON, CONNECTICUT, EFFECTIVE OCTOBER 1, 2015.

Sealed proposals to perform the subject project in accordance with the specifications enclosed herewith, and made a part of this invitation, will be received in the Finance Office:

Nicholas J. DiCorleto, Jr., Finance Officer/Treasurer  
55 Main Street P.O. Box 187  
Ellington, CT 06029-0187

until September 8, 2014 at 2:00 PM, when and where the Proposals will be opened and read aloud.

Any proposal 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.

All Proposals must include the enclosed completed PROPOSAL FORM FOR 2015 REVALUATION (pages 8-9), and be placed in a sealed envelope. The sealed envelope shall be plainly marked "PROPOSAL FOR 2015 REAPPRAISAL AND REVALUATION". All interested parties shall deliver three (3) copies of their Proposal.

The project award and signing-of-contract conditions are set forth in the enclosed specifications.

The completion date through the informal public meetings is December 18, 2015. The late completion penalty date is November 20, 2015 as defined in the enclosed Contract Specifications. The time schedule of the project is also set forth in the enclosed Contract Specifications.

Questions not addressed in this Request for Proposal must be submitted in writing to Cindy Roman, Assessor, Town of Ellington, 55 Main Street, P.O. Box 199, Ellington, CT 06029-0199 by September 3, 2014. Responses will be forwarded to prospective parties as deemed appropriate by the TOWN OF ELLINGTON.

All Proposals must conform to the Request For Proposal Format and Contents. The TOWN OF ELLINGTON, at its discretion, may reject any non-conforming Proposal or Proposal that materially misrepresents any offering.

REQUEST FOR PROPOSAL (Continued)

The Assessor and such other persons as determined by the Town may interview as many of the Proposers as desired to evaluate better the proposals it is considering. The Assessor et al shall have no obligation to grant any interview.

The TOWN OF ELLINGTON reserves the right to amend or cancel this REQUEST FOR PROPOSAL, at any time or not award any contract if it is in the best interest of the TOWN OF ELLINGTON. The TOWN OF ELLINGTON reserves the right to reject any, or any part of, or all Proposals; to waive informalities and technicalities; and to accept that Proposal which the TOWN OF ELLINGTON and the ASSESSOR deem to be in the best interest of the TOWN OF ELLINGTON, whether or not it is the lowest dollar Proposed.

Consideration in the awarding of the CONTRACT will be given, but not limited to: price, the accuracy and responsiveness of the PROPOSER, the experience, competence and financial condition of the PROPOSER, time for completion and/or labor force adequate to perform the work, the nature and size of the PROPOSER'S organization, quality of similar projects it has performed and completed in the past in Connecticut, other projects and/or revaluations currently under contract by the PROPOSER including the evaluations or recommendations of personnel with whom the PROPOSER is or has worked, the experience and ability to work with the VISION CAMA software used by the TOWN and a determination by the TOWN that the PROPOSER has the ability to complete the revaluation successfully.

Under this Proposal, the PROPOSER would provide the services described in the Contract and its accompanying Contract Specifications. The Proposal must remain effective until December 7, 2014. The Contract will be awarded by that date if it is to be awarded.

Mandatory Pre-Proposal Meeting: The Assessor will conduct a meeting to review this Request For Proposal, the state of the current assessment records, available mapping and web availability. Any firm intending to submit a proposal must attend this meeting with at least one representative. The meeting will be held in the Meeting Hall, Ellington Town Hall, 55 Main Street, Ellington CT on Wednesday, August 27, 2014 at 2:00 PM prevailing time.

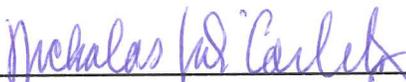
REQUEST FOR PROPOSAL (Continued)

**REQUEST FOR PROPOSAL PROCESS SCHEDULE**

<b>EVENT</b>	<b>DATE</b>	<b>TIME</b>
Issue Request for Proposal	8/11/2014	N/A
Mandatory Pre-Proposal MTG	8/27/2014	2:00 PM
Deadline for Questions	9/3/2014	1:30 PM
Receipt of Sealed Proposals	9/8/2014	2:00 PM
Proposal Remains Effective to	12/7/2014	N/A

DATE: August 11, 2014

TOWN OF ELLINGTON

BY:   
\_\_\_\_\_  
Nicholas J. DiCorleto, Jr., Finance Officer/Treasurer

**PROPOSAL FORMAT AND CONTENTS**

Proposals shall include the following information organized in the following format:

1. Proposals shall be submitted on the appropriate form provided and signed by an Authorized agent of the PROPOSER (See pages 8-9).
2. Proposals must include the Name, telephone number, FAX number and e-mail address of persons(s) to be contacted for further information and clarification (See page 9).
3. Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number, size of municipality, scope of services rendered and date completed.
4. Listing of all municipal revaluations, now underway or under contract, including client contact telephone number, size of municipality, scope of services to be rendered and date to be completed.
5. Listing of personnel to be assigned to TOWN'S revaluation, including years of experience in current positions and other revaluation positions, municipalities served, and their roles in those revaluations. Copy of employee's current Connecticut Revaluation Employee Certification and resumes of personnel assigned shall also be included.
6. Description of the methodologies to be used for assessing values for residential, commercial, industrial, and vacant land parcels.
7. Description of sales analysis to be performed to verify accuracy of valuations.
8. Listing of municipalities where you have performed revaluations utilizing Vision Appraisal CAMA software and include within the proposal the cost to have a professional relationship with Vision Appraisal throughout this project.
9. Description and outline summary of the proposed public relations program that would be used during the revaluation.
10. Copy of the firm's current Connecticut Revaluation Certification.
11. Provide the Company history including how many years the firm has been engaged as a company, corporation, partnership, or individual specializing in municipal revaluation services.

**PROPOSAL FORMAT AND CONTENTS (Continued)**

12. Copy of the firm's Financial Statement for the last two (2) fiscal years.
13. The PROPOSERS must submit, as part of the Proposal Form, a schedule and percentage of completed work based upon experiences of the Contractor, in performing revaluations and based upon the contract's specifications, as forth in the Contract Specifications on the enclosed form.
14. PROPOSER must provide the method in which they would host the CAMA data on the Internet.
15. PROPOSERS must submit a Bid Bond or certified check for five (5) percent of the proposal submitted.
16. PROPOSERS must quote the project as outlined in the Contract and Contract Specifications.

**PROPOSAL FORM FOR 2015 REVALUATION**

**PROJECT: THE COMPLETE REAPPRAISAL AND REVALUATION OF REAL PROPERTY (TAXABLE AND EXEMPT) LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF ELLINGTON, CONNECTICUT EFFECTIVE OCTOBER 1, 2015.**

The undersigned, duly authorized agent for the individual, partnership, corporation or other entity (hereinafter-called PROPOSER) submitting this quote 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 PROPOSAL on the subject project.
2. That should this PROPOSAL be accepted in writing by the Town of Ellington, Connecticut (hereinafter called TOWN), said PROPOSER will furnish the services for which this PROPOSAL is submitted at the dollar amount indicated and in compliance with the provisions of said CONTRACT and CONTRACT SPECIFICATIONS.
3. That the PROPOSER or their representative has visited the TOWN; is familiar with its geography, general character of housing and its commercial and industrial areas; has examined the quality and condition of the ASSESSOR'S records; and has met with the ASSESSOR to make themselves knowledgeable of those matters and conditions in the TOWN which would influence this Proposal.
4. That all items, documents and information required to accompany this Proposal of the previously mentioned PROPOSAL FORMAT AND CONTENTS are enclosed herewith.
5. That the PROPOSER proposes to furnish the services and materials required to complete the subject project in accordance with the previously mentioned Specifications for the total amount  
of:

\$ \_\_\_\_\_ TO REVALUE ALL REAL PROPERTY

\$ \_\_\_\_\_ WEB HOSTING COST PER YEAR

\$ \_\_\_\_\_ **TOTAL**

6. Proposed schedule prices for aforementioned proposals are valid until December 7, 2014.

**PROPOSAL FORM FOR 2015 REVALUATION (Continued)**

Please type or print

FIRM NAME OF  
PROPOSER:

\_\_\_\_\_

TYPE OF  
LEGAL ENTITY:

\_\_\_\_\_

BY  
SIGNATURE:

\_\_\_\_\_

TITLE OF  
PERSON SIGNING:

\_\_\_\_\_

CONTACT PERSON:

\_\_\_\_\_

TELEPHONE NUMBER:

\_\_\_\_\_

FAX NUMBER:

\_\_\_\_\_

E-MAIL:

\_\_\_\_\_

**CONTRACT**

**THE COMPLETE REAPPRAISAL AND  
REVALUATION OF REAL PROPERTY (TAXABLE AND EXEMPT)  
LOCATED WITHIN THE CORPORATE LIMITS OF  
THE TOWN OF ELLINGTON, CONNECTICUT  
EFFECTIVE OCTOBER 1, 2015**

This agreement made this        day of        ,2014 by and between the Town of Ellington, a municipal corporation, located in the County of Tolland, State of Connecticut, hereinafter termed the TOWN, acting by and through its First Selectman, Maurice W. Blanchette, having been so duly authorized,

hereinafter termed the CONTRACTOR.

WITNESSED THAT:

WHEREAS, the TOWN, through its Assessor, will undertake a complete reappraisal and revaluation of all real property located within the corporate limits of the TOWN; and

WHEREAS, the CONTRACTOR is to assist the Assessor in making such reappraisal and revaluation and represents that it is experienced and qualified to carry on such work, and is familiar with the recognized appraisal practices and with the standards required for determining ad valorem values for assessment purposes,

NOW, THEREFORE, the TOWN and the CONTRACTOR, for the consideration and under the conditions hereinafter set forth, hereby agree as follows:

**ARTICLE 1:  
CONTRACT DOCUMENTS**

- 1.1 The Contract Documents consist of all of the documents listed in Paragraph 1.2. All of the documents form the Contract between the parties and are as fully a part of the Contract as if attached to this Agreement or repeated herein. The Contract is the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations or agreements, either written or oral. An enumeration of the Contract Documents, other than modifications subsequent to this Agreement, is listed in Section 1.2.

CONTRACT DOCUMENTS (Continued)

1.2 The Contract Documents, except for modifications which may be issued after execution of this Agreement, are:

- (a) This Contract as executed by the parties; and
- (b) The Request for Proposal, Proposal Format and Contents, Proposal Form for 2015 Revaluation, General Conditions; Specifications; and
- (c) The Proposal submitted by the Contractor

2.1 CONTRACT WORK

The TOWN hereby engages the CONTRACTOR and the CONTRACTOR hereby agrees to make a complete reappraisal and revaluation of all real property located within the corporate limits of the TOWN and to perform all the services and furnish all the records, materials, forms and supplies required by and in complete accordance with the Contract Specification, the proposal documents submitted by the Contractor, and Federal and State requirements. All such labor, records, materials, forms and supplies to comply with the requirements of the pertinent Connecticut General Statutes and Special Acts, pertinent Regulations of Connecticut State Agencies, pertinent rulings of the Secretary of Office of Policy and Management, pertinent ordinances and agreements of the TOWN, and pertinent decisions of several courts.

2.2 COMMENCEMENT AND COMPLETION DATES

The CONTRACTOR agrees to commence the work on or before October 1, 2014 and to adhere to the Time Schedule for the revaluation project as set forth in the Contract Specifications under General Conditions section I-4.

3. COMPENSATION

The TOWN agrees to pay the CONTRACTOR the total sum of \$ \_\_\_\_\_ as compensation for the CONTRACTOR'S services to be performed and the records, materials, forms and supplies to be furnished by the CONTRACTOR. The method of billing and payments will be as follows.

Partial Payments. 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 total work completed under the contract which the CONTRACTOR has performed during the said thirty (30) day period less ten percent (10%) retainage. Such notification will itemize, and accurately indicate the extent and nature of work performed by volume, street, category or in any manner as required by the ASSESSOR.

3. COMPENSATION (Continued)

The itemization shall be categorized by each of the "Stages of Completion" listed on the Payment Schedule listed in Section I.F.2. The Town will pay the amount approved by the Assessor in accordance with the Stages of Completion less 10% retainage within 15 days of Assessor's approval.

Final Payment. Final Payment equal to the balance of the Contract Price, less retainage, shall be paid after completion of all work required through completion of the work of the Board of Assessment Appeals for all revalued property and upon approval of the Board of Selectman. No interest will be allowed or charged. Payment of the contract sum shall not be deemed a waiver of release of the Contractor's responsibility to correct nonconforming work in the Contract Documents nor to satisfy any other requirements which may survive final payment.

Retainage shall be held and paid to the CONTRACTOR upon final disposition of any and all court appeals resulting from the revaluation and to insure completion of the litigation support required of the CONTRACTOR.

Web Hosting Fees. The Town will pay 75% of the web hosting fee when the Contractor certifies that all required data is on the web and assessable for all intended users. The balance will be paid on or about March 15, 2015 provided the Assessor confirms that the web hosting has met this contract standard and approval by the Board of Selectman.

4. TRANSFER, ASSIGNMENT AND SUBLETTING OF CONTRACT

The CONTRACTOR agrees that it shall not transfer, assign or sublet the contract, or any part therein, or any interest therein without first receiving prior written approval from the TOWN and the bonding company, and further agrees that any such assignment or transfer without prior written approval by the TOWN and bonding company shall not release the CONTRACTOR from any responsibility or liability as set forth in this contract and specifications.

Nothing contained in the Contract or Contract Specifications shall be deemed to create any contractual relationship between any subcontractor and the TOWN.

5. INDEMNIFICATION AND CONDITIONS

- A. The CONTRACTOR is an independent contractor and, as such, is not and shall not be construed to be an agent or employee of the Town of Ellington. The CONTRACTOR further agrees to indemnify, hold harmless and defend the TOWN at the CONTRACTOR'S expense from and against any and all liability for loss, damage or expense for which it may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the operations to be performed under this Contract, or cost and

expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of this Contract.

5. INDEMNIFICATION AND CONDITIONS (Continued)

- B. Upon execution of this contract and thereafter no less than fifteen (15) days prior to the expiration date of any insurance policy delivered pursuant to this contract, the CONTRACTOR shall deliver to the TOWN a certificate(s) of insurance to show compliance with Section I.C.2 of the specifications regarding insurance.
- C. 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 reasonably acceptable to the TOWN and shall have an A.M. Best Company rating of "A/VII" or better.
- D. 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.
- E. The CONTRACTOR will promptly notify the TOWN of any claim or case formally brought against the CONTRACTOR whether or not involving work for the Town of Ellington.
- F. The CONTRACTOR'S Software License Agreement is attached hereto and made a part thereof as Attachment B.

6. MISREPRESENTATION OR DEFAULT

The TOWN may void this agreement if the CONTRACTOR has materially misrepresented any information submitted in connection with its proposal or defaults on any revaluation contract with another Connecticut municipality. In such event, the CONTRACTOR shall be liable for any damages incurred by the TOWN.

7. CANCELLATION

If the CONTRACTOR does not pay its debts as they become due, or if a receiver shall be appointed for its business or its assets and not voided within sixty (60) days, or if the CONTRACTOR shall make an assignment for the benefit of creditors, or otherwise, or if any ownership in Contractor interest shall be sold, transferred or if it shall be adjudicated insolvent or bankrupt then and forthwith thereafter, the TOWN shall have the right at its option and without prejudice to its right here under to terminate the Contract and withhold any payments due.

7. CANCELLATION (Continued)

If the Contractor fails to perform the Contract in accordance with its terms or if the TOWN reasonably finds that the CONTRACTOR'S work is not progressing in such a manner as to ensure compliance with the schedule of completion dates set forth in the Contract Specifications and any addendum thereto, the TOWN shall have the right, in addition to all other remedies it may have, upon seven (7) days written notice to the CONTRACTOR and its surety bonding company, to declare the contract in default and thereby terminated, and to award the Project or the remaining work thereof to another contractor. If this termination clause is invoked, the CONTRACTOR'S agents and employees shall, at the Assessor's direction hand over all records, properly filed and indexed and any Town property in its possession to the Assessor. Any funds held by the TOWN under the Contract and not yet paid to or for the benefit of the Contractor shall become the property of the TOWN to the extent necessary to reimburse the TOWN for its costs in obtaining another contractor and supervising the transition. Termination of the Contract and retention of funds by the TOWN shall not preclude the TOWN from bringing an action against the CONTRACTOR for damages or exercising any other legal, equitable, or contractual rights the TOWN may possess in the event of the CONTRACTOR'S failure to perform.

8. LIQUIDATED DAMAGES

- a. Failure by the CONTRACTOR to complete all work prior to the date specified herein, November 20, 2015, shall be cause for a penalty payment by the CONTRACTOR. For the purposes of liquidated damages only, completion of all work not later than November 20, 2015 is defined as follows:
  1. Complete CAMA database, integration of CAMA software with administrative software, property record cards with all measurements, listings, sketches, pricing, review and final valuations.
  2. Assessment change notices mailed to comply with requirements of Connecticut State Statutes.
- b. The parties agree that in the event the Contractor fails to meet any of the time limits set forth in this agreement, the damages sustained by the Town are difficult to determine and therefore the parties desire to make that determination in advance. They mutually agree that the sum of FIVE HUNDRED FIFTY DOLLARS (\$550) per day for each day of delay in meeting any of the time limits is a fair and reasonable amount to compensate the Town for the additional costs which it will incur because of the delay.

- c. Liquidated Damages due under this clause shall be deducted from the contract price and will represent a fair and equitable estimate of the damages the TOWN will suffer if the CONTRACTOR'S work is not completed by November 20, 2015. The TOWN shall have the right to use the funds withheld from each periodic payment to these contract specifications, to satisfy in whole or in part, this liquidated damages clause.
- d. Delays occasioned by war, strike, explosion, or acts of God or an order of court or other public authority are excepted.
- e. Contractor shall be liable for payment of the liquidated damages if there remains insufficient funds due Contractor under this contract and Contractor shall pay the Town within 30 days of written demand.

Appendix A, Contract Specifications, the Request For Proposal and the Proposal Form is made part of and is expressly incorporated herein as if fully set forth.

IN WITNESS HEREOF THE TOWN OF ELLINGTON, CONNECTICUT AND

\_\_\_\_\_ have executed this contract on the date first above mentioned.

IN THE PRESENCE OF:

TOWN OF ELLINGTON, CONNECTICUT

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

BY: \_\_\_\_\_  
Maurice W. Blanchette, First Selectman

\_\_\_\_\_  
(Signature and Title)

Approved as to form and correctness:

\_\_\_\_\_  
Atherton B. Ryan, Town Attorney

\_\_\_\_\_  
Date

## APPENDIX A

### CONTRACT SPECIFICATIONS

#### DEFINITIONS

**ASSESSOR.** The word "ASSESSOR" shall mean the duly appointed Assessor of the Town of Ellington, Connecticut.

**CAMA.** The abbreviations "CAMA" means a Computer-Assisted Mass Appraisal system.

**CONTRACT SPECIFICATIONS.** The terms "CONTRACT SPECIFICATIONS" or "SPECIFICATION" shall mean this EXHIBIT A, which has been attached to, and made part of, a certain CONTRACT between the TOWN and CONTRACTOR.

**PROJECT.** The word "PROJECT" shall mean the revaluation and reappraisal of all taxable and tax exempt real property within the corporate limits of the Town of Ellington, Connecticut.

**CONTRACTOR.** The word "CONTRACTOR" shall mean the person, firm, corporation, association, or other entity engaged by the Town of Ellington to perform the revaluation.

**TOWN.** The word "TOWN" shall mean the Town of Ellington, Connecticut.

#### SCOPE OF REAPPRAISAL AND REVALUATION

This project includes the complete reappraisal and revaluation, as defined in Sec. III entitled "Appraisal Specifications", of all real estate within the corporate limits of the Town of Ellington, Connecticut. This reappraisal and revaluation project will include 2 new digitized photographs of each structure in addition to retaining the prior photographs and input of these new photographs into the Vision Appraisal CAMA system. This project will also include comparison of all new data with current records of the Assessor to verify accuracy and all new data is to be entered into the Vision Appraisal CAMA system.

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

All work will be carried out and all forms, material and supplies utilized in this project shall conform to and be carried out in accordance with the requirements of the Secretary, 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.

**SCOPE OF REAPPRAISAL AND REVALUATION (Continued)**

The values to be determined shall be the true and actual 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 Practices, as required by Connecticut General Statutes for the licensing and certification of all individuals involved in the appraisal of real estate.

The Revaluation Project will cover and include all real property in the TOWN including the following categories:

1. All taxable real estate, land, buildings and improvements
2. All tax exempt real estate, land, buildings and improvements
3. All public utility land and buildings

**EFFECTIVE DATE**

The effective date of this revaluation PROJECT shall be for the October 1, 2015 Grand List and the pricing and valuation by the CONTRACTOR of all land, buildings and property under this CONTRACT shall reflect the true and actual value as of October 1, 2015.

**TOWN DATA**

<u>Date of Last Revaluation (Full)</u>	<u>October 1, 2010</u>
<u>Taxable Grand List 2013</u>	<u>\$1,126,320,506</u>
<u>Estimated Population</u>	<u>15,856</u>
<u>Area of Town (square miles)</u>	<u>34.6</u>
<u>Number of Valid Property Transfers in 2013</u>	<u>114</u>
<u>Form of Government</u>	<u>Board of Selectmen, Charter</u>

**Approximate Number of Accounts**  
**October 1, 2013 Grand List**

<b>Property Type</b>	<b>Number of Accounts</b>
Residential Dwellings	4,571
Residential Condominiums	636
Residential Vacant Land	180
Commercial Buildings	136
Apartments	19
Industrial Buildings	41
Commercial & Industrial Vacant Land	9
Exempt	197

I. GENERAL CONDITIONS

A. CONTRACTOR

The 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 provisions of Federal and State governments. The CONTRACTOR shall submit to the TOWN, written qualifications and copies of Connecticut Revaluation Employee Certifications as well as a copy of a valid driver's license for all personnel assigned to this project

All personnel assigned to this project shall be subject to approval of the ASSESSOR, **prior** to the commencement of the individual's duties in the TOWN and shall be removed from this project by the CONTRACTOR upon written notification from the ASSESSOR.

1. Minimal Qualifications

a. Project Manager or Supervisor

The administration of this project shall be by 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 three (3) 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.

The project manager or supervisor shall spend a sufficient percentage of the supervisor's working time per month in Ellington in order to complete the project on schedule. Sufficient time and personnel shall be submitted by the CONTRACTOR and approved by the ASSESSOR. This provision shall be effective from the commencement of work in the Town until the successful completion of the project as outlined in the time schedule.

I. GENERAL CONDITIONS (Continued)

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 have not less than three (3) years of practical appraisal experience in the appraisal of the particular type of properties for which they are responsible. Two years of this experience shall have been in the mass appraisal field and shall have occurred within the past five 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. Data Collectors

Data Collectors shall have a high school diploma or equivalency and at least three years experience in the appraisal or municipal revaluation field. Any field person who does not meet the above qualifications must work under the direct supervision of an appraiser or project supervisor. The ASSESSOR shall be notified of the individual's name, starting date, qualifications, and field assignments **prior** to the commencement of the individual's duties on this project.

2. Background Check

All personnel will be subject to background checks by the Ellington Resident State Troopers Office or such other service as the TOWN may select.

3. Identification

All field personnel shall have visible and clip-on identification cards that shall include an up-to-date photograph, supplied by the CONTRACTOR and signed by the TOWN'S First Selectman. 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 Assessor and the Ellington Resident State Troopers Office, including license number, make, model, year and color of all vehicles used on this project.

4. Conflict of Interest

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

I. GENERAL CONDITIONS (Continued)

5. Office Hours and Staffing

CONTRACTOR shall maintain an office in the Ellington Town Hall, as needed, from the commencement of work on this project through the conclusion of the public hearings. This office shall be staffed at CONTRACTOR'S expense with clerical staff as needed, as well as other qualified full-time persons and such office equipment, computers, printers, etc. as to ensure the successful completion of this project in accordance with the completion dates set forth in the Contract Specifications and any Addenda thereto.

C. PROTECTION OF THE TOWN

1. Bonding

The CONTRACTOR shall, to secure the faithful performance by the CONTRACTOR of the terms of this agreement, furnish to the TOWN, a Performance Surety Bond in the amount of this 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 at the time the contract is signed and shall be in a form satisfactory and approved by the TOWN'S Attorney. This bond shall included the appeal requirements of these specifications. It is understood and agreed that upon completion of approved delivery to the TOWN of the revaluation, that the bond shall be reduced to 10% of the value of the contract to cover defense of all appeals. This reduced amount of bond shall become effective after the revaluation has been completed and has been approved by the ASSESSOR and after completion of the duties of the Board of Assessment Appeals. The reduced amount of the bond shall remain effective until a final resolution in the courts of any timely appeals taken from the decisions of the Board of Assessment Appeals on the list of October 1, 2015. The TOWN reserves the right to waive any bond or insurance requirement if it is in the best interest of the TOWN.

2. Insurance

The CONTRACTOR shall, at its own expense, provide and keep in force for the duration of this contract:

- a. Required State Statutory coverage for Workers' Compensation insurance and employers' liability insurance in the amount of \$100,000. The policy must provide coverage for benefits payable under the Connecticut Workers Compensation Act, and included the Voluntary Compensation endorsement.

I. GENERAL CONDITIONS (Continued)

b. 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. Any deductible applicable to a claim must be noted on the certificate of insurance and shall not exceed \$5,000. If the policy is written on a claims made policy form, the insurance must be maintained by the CONTRACTOR for a period of two years from completion of the contract.

c. During the term of the contract, the CONTRACTOR shall provide public 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, blanket contractual and personal injury. The required limits of liability are:

\$1,000,000 – General Aggregate  
\$1,000,000 – Product-Completed Operations Aggregate  
\$1,000,000 – Personal and Advertising Injury  
\$1,000,000 – Each Occurrence  
\$ 50,000 – Fire Damage/Fire  
\$ 5,000 – Medical Expense/Person

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

d. 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 not less than \$1,000,000.

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

e. Patent/Copyright Liability: 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 this contract.

f. Contractor shall provide certificates evidencing compliance with these requirements prior to any work being done and as policies are renewed.

I. GENERAL CONDITIONS (Continued)

D. CHANGES AND SUBLETTING OF CONTRACT

1. Changes

Changes in these General Conditions or specifications to the contract will be permitted only upon written mutual agreement of the CONTRACTOR and the TOWN, which shall define the change and set forth any change to CONTRACTOR'S compensation and/or specify any changes in the performance dates.

E. COMPLETION DATE AND TIME SCHEDULE

1. Awarding of Contract

Within a reasonable time after the opening of the proposals, the TOWN shall award a contract for the revaluation project. The TOWN reserves the right to reject any and all proposals.

2. Signing of Contract

Within a reasonable time after receipt of notice of acceptance by the TOWN of its proposal, as may have been revised by mutual agreement, the CONTRACTOR shall execute with the TOWN, a contract upon the basis of these specifications as revised.

I. GENERAL CONDITIONS (Continued)

4. Revaluation Schedule

The revaluation work may be started at the convenience of the CONTRACTOR, but not later than Wednesday, October 1, 2014 and must continue in a diligent manner so as to ensure completion within the schedule of completion dates as set forth below.

a. Completion Dates

CONTRACTOR will complete the following phases of the revaluation in accordance with the following schedule:

1. Complete residential data collection by May 1, 2015. (except for current building permits)
2. Complete commercial, industrial, public utility, and tax exempt data collection by June 1, 2015. (except for current building permits)
3. Complete land study and set values by September 1, 2015.
4. Complete building cost manual by October 1, 2015.
5. Complete study of market rents, expenses, and capitalization factors by October 1, 2015.
6. Deliver complete CAMA database, integration of CAMA software and video images. Deliver Real Estate Property cards with sketches, measurements, listings, pricing and suggested values to the Assessor by October 15, 2015.
7. Assessor completes review and final adjustments made for real property no later than November 10, 2015.
8. Assessment notices mailed to comply with requirements of Connecticut State Statutes by November 20, 2015 (Contractor to pay postage) and new assessment information is to be made available on line by the same date.
9. Informal meetings between property owners and CONTRACTOR will begin no later than December 1, 2015 and end by December 15, 2015.
10. Notices of results finalized after the informal meetings are to be mailed

out, computer file is updated and final property record cards printed not later than January 4, 2016.

I. GENERAL CONDITIONS (Continued)

F. 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 said thirty (30) day period. Such notification will itemize, and accurately indicate the extent and nature of 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 Payment Schedule listed in I.F.2

The TOWN upon approval of the ASSESSOR that the certification of the CONTRACTOR concerning work during said period is accurate will pay to the CONTRACTOR a percentage of the total compensation under the contract equal to the percentage of the work certified as having been completed during said period, less ten (10) percent which is retained by the TOWN for payment to the CONTRACTOR at such time that he or she has performed fully and satisfactorily all its obligations and requirements, under the contract through and including completion of the work of the Board of Assessment Appeals on the October 1, 2015 Grand List.

Delivery of all required documents and material to the satisfaction of the Assessor and completion of the work of the Board of Assessment Appeals shall constitute Final Completion under the Contract, with the exception of litigation support, and upon recommendation of the Assessor and approval of the Board of Selectman the CONTRACTOR shall be entitled to final payment except for retainage. Retainage in the amount of 10% shall be held until all appeals from the revaluation have been resolved by settlement or judgment at which time the balance due shall be paid.

I. GENERAL CONDITIONS (Continued)

2. Payment Schedule for Percentage of Completed Work

<u>Stages of Completion</u>	<u>Percentage of Total Project Cost</u>
Bonding, Office Set-up and Project Start-up	_____ %
Residential data collection, comparison with existing records, photos	_____ %
Commercial, industrial, public utility and tax exempt data collection, comparison with existing records, photos	_____ %
Verification of sales and data collection	_____ %
Valuation analysis	_____ %
Field Review	_____ %
Final Valuations; Assessment notices mailed	_____ %
Informal Hearings completed and final adjustments made to file	_____ %
Training	_____ %
Board of Assessment Appeals completion of duties	_____ %
Litigation*	_____ %
TOTAL	100%

\*Cost of Litigation included as part of bonding costs.

Upon completion of the duties of the Board of Assessment Appeals, the performance bond will be reduced to 10% of the contract price to ensure the defense of any appeals resulting from the revaluation work.

## II. 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 true and actual valuations, and shall not undervalue or overvalue any land, building or other property to avoid or minimize its responsibilities under Section II 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 program.

The CONTRACTOR shall place the assessment data onto the Vision CAMA website from the date that the revaluation notices are mailed. The detailed information pertaining to all revaluated properties shall be approved by the Assessor, prior to appearing on the website.

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.

### C. CONDUCT OF COMPANY EMPLOYEES

As a condition of this contract, CONTRACTOR'S employees shall, at all time, treat the residents, employees and taxpayers of the TOWN with respect and courtesy; CONTRACTOR shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision. A suitable dress code for all employees will also be implemented.

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

D. RECORDS

1. General Provisions

The CONTRACTOR shall provide all property record cards, computer supplies, and 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. 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 or 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 custody of the ASSESSOR. Such records and computations shall include but not limited to : 1) assessors maps; 2) land value maps; 3) materials and wages, cost investigations and schedules; 4) data collection forms, listing cards, property record cards with property valuations and sketches; 5) capitalization rate data; sales data; 7) depreciation tables; 8) computations of land and/or building values; 9) letters of memoranda to individuals or groups explaining methods used in appraisals; 10) operating statements of income properties; 11) duplicate notice of valuation changes; and 12) database of all property records, CAMA system and integration with administrative system. 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 provided by 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 of the corporate limits of the TOWN without **prior** written approval of the ASSESSOR. The ASSESSOR will permit the CONTRACTOR to use all current real property data. No original Town record will be edited or marked in any way or deleted by the Contractor

and shall be returned in the condition as when taken by the Contractor. Contractor may copy any record for its use.

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

4. Property Record Cards

The CONTRACTOR shall provide and complete Property Record Cards and file in street name and number order. These cards shall contain all manner of information affecting the value, including but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage as applicable, along with the unit value applicable to each, public utilities available, public improvements, census tract 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, percent of physical, functional and economic depreciation, depreciated values, fair market value and assessment value will be shown. A computer generated sketch of all buildings, with the appropriate scale of such sketch, will also be shown on these cards, as well as two new photo images of each major structure.

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 prior value and the valuation 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 informal public meetings and information describing the property owner's right to appeal the valuation of his property, including the manner in which an appeal may be filed with the Board of Assessment Appeals. Such notice shall be subject to the approval by the ASSESSOR.

F. INFORMAL MEETINGS WITH OWNERS

At a time mutually agreeable to the ASSESSOR and the CONTRACTOR, but not later than December 1, 2015, and following completion of all review work by the ASSESSOR and the CONTRACTOR, CONTRACTOR shall hold public meetings so that owners of property or their legal representative may appear at specified times to discuss, with qualified members of CONTRACTOR'S staff, the valuations of their property. CONTRACTOR'S personnel shall explain the manner and methods of arriving at value. Informal public meetings, at the ASSESSOR'S discretion may be held on weekdays, weeknights and Saturdays.

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

F. INFORMAL PUBLIC MEETINGS (Continued)

CONTRACTOR, in conjunction with recommendations of the ASSESSOR, shall schedule a sufficient number of meetings and provide sufficient personnel to handle said meetings expeditiously and fairly. Any information offered by the taxpayer or their legal representative shall be given consideration, and an adjustment be made where warranted. The public meetings shall be completed by December 15, 2015.

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

CONTRACTOR shall require each person, or his or her legal representative, who appears at a meeting to sign a form indicating whether or not CONTRACTOR shall reinspect the property being questioned; such decision to reinspect to be at the reasonable discretion of CONTRACTOR. This form shall be approved by the ASSESSOR and provided by CONTRACTOR. The completed and signed forms shall be turned over to the ASSESSOR at the conclusion of the meetings. Any such reinspection shall be made as soon as possible.

CONTRACTOR shall be responsible for sending notice, by first class mail at CONTRACTOR'S expense, to each taxpayer or his or her legal representative who appears at these meetings seeking review of valuation. Such notice shall include the original valuation determined by the CONTRACTOR and any adjusted valuation as deemed appropriate based on information received at such meeting or a statement that no change is warranted. Such notice shall be subject to approval by the ASSESSOR.

G. BOARD OF ASSESSMENT APPEALS

CONTRACTOR will have a qualified member of its staff with firsthand knowledge of the project and Contractor's duties under the contract, available upon request, for attendance at any meetings of the Board of Assessment Appeals held after the completion of the revaluation, Sundays excluded, to assist in the settlement of complaints and to explain the valuations made; but such availability and attendance shall not be required after the date for the completion of the duties of the Board of Assessment Appeals with respect to the October 1, 2015 Grand List, or for one complete calendar year beyond completion of the Revaluation, whichever comes first.

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

H. LITIGATION

In the event of appeals to the courts, the CONTRACTOR shall furnish a competent witness or witnesses, approved by the ASSESSOR, to defend the valuation of the properties appraised. CONTRACTOR will provide supporting data, including written appraisals if deemed necessary by the Assessor, for any said court appeals. CONTRACTOR will also comply with any request by the TOWN to answer any interrogatories or provide witnesses for depositions. CONTRACTOR shall not be held responsible for any assessment changed from the original valuation figure by parties other than the CONTRACTOR, unless the figure determined by CONTRACTOR was unreasonable, unsupportable or erroneous in the view of the ASSESSOR.

I. INFORMATION

1. Information to TOWN

The CONTRACTOR shall give to the ASSESSOR any and all information requested pertaining to the project for a period of one year after completion of the duties of the Board of Assessment Appeals on the October 1, 2015 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, building cost schedules. These schedules will reflect the unit-in-place method based upon the square foot or cubic foot area of the building. These schedules shall be used in computing the replacement cost in the TOWN for all residential, commercial,

industrial, public utility, exempt and agricultural construction.

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

J. BUILDING COST SCHEDULES (Continued)

1. General (Continued)

They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineering and architect fees and all other direct and indirect costs of construction. Before final acceptance, they shall be proven by testing against known sales. All finalized schedules shall be approved by the ASSESSOR before adoption and usage by the CONTRACTOR.

2. Types of Cost Schedules

a. Residential

Residential cost schedules shall include schedules for various classifications, types, models and story heights on a per square foot basis, normally associated with residential buildings. The schedule shall be flexible with special sections 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, attached, detached, and basement garages, and schedules for other building improvements usually found on residential property including but not limited to in-ground swimming pools, barns, sheds, tennis courts and gazebos.

b. Commercial

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

II. RESPONSIBILITIES OF THE CONTRACTOR (Continued)

J. BUILDING COST SCHEDULES (Continued)

d. Farm

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

Cost schedules for the aforementioned must be supported by a recognized valuation publication company such as Marshall and Swift.

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 and shall be approved by the ASSESSOR.

4. Schedules for TOWN

The CONTRACTOR shall supply and leave for the TOWN not less than three (3) copies of all the above required building cost schedules and depreciation schedules for the TOWN'S usage, one copy of which shall be turned over to the ASSESSOR upon approval of the schedules.

III. APPRAISAL SPECIFICATIONS

A. APPRAISAL OF LAND

The CONTRACTOR shall appraise all land within the TOWN: residential, commercial, industrial, agricultural, special use, public utility, and tax exempt, both vacant and improved.

1. Land Inspection

The CONTRACTOR shall make a physical inspection of each plot or lot and note

topographical irregularities, such as steep slopes, wetlands, easements or anything else, which may detract from the usefulness and value of the land.

### III. APPRAISAL SPECIFICATIONS (Continued)

#### A. APPRAISAL OF LAND (Continued)

##### 2. 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, 2015. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the ASSESSOR. 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, inland wetlands, topography, soil conditions, utilities, size, vacancy, form of ownership, non-conforming uses, and zoning variances. Non-conforming uses and zoning variances shall be considered in establishing values. A brief description of each lot or parcel of land, together with the valuation computations, shall be entered on the field record card.

##### 3. Land Value Unit

The CONTRACTOR shall prepare land unit values by front foot, square foot, acreage or fractional acreage; whichever in the judgment of the CONTRACTOR and ASSESSOR most accurately reflects the market for the appraised land.

##### 4. Land Value Map

The CONTRACTOR shall delineate the land value units on all streets and acreage in the TOWN on a suitable map to be provided by the TOWN. The land value map shall be returned to the TOWN prior to the completion of the PROJECT.

##### 5. Neighborhood 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" units within the TOWN. Each neighborhood unit will, in the CONTRACTOR'S opinion, exhibit homogenous characteristics. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. These neighborhood codes shall be recorded and maintained on all property record cards and computer database.

III. APPRAISAL SPECIFICATIONS (Continued)

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES

The CONTRACTOR shall physically view and make a list of the physical construction details of all residential building and structures and all structural improvements appurtenant to residential property in TOWN including two (2) digital photos of two different views of the structure and enter all necessary data on approved forms. Interior inspections are required as specified in Sec. 2, hereafter.

1. Interior Inspections

- a. The CONTRACTOR is to perform interior inspections of all sale properties to be utilized in the analysis which will include a minimal of 12 months of sales which are estimated at approximately 115 properties.
- b. The Contractor is to perform interior inspections of all outstanding Building Permits which effect value which are estimated at approximately 200.
- c. The Contractor is to perform interior inspections of all commercial and industrial properties which are estimated at approximately 200 properties.
- d. The data collector shall have each interior inspection dated and verified by having an adult owner or resident of each building or dwelling unit sign the data collection form.
- e. When entrance to a building for an inspection is refused, the data collector shall make note of the fact and within two (2) working days, 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 she is unable to gain the cooperation of the party involved, she shall notify the CONTRACTOR, and they shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and make adequate notations on the lack of cooperation, and the manner of arriving at value conspicuously on the property record card.
- f. The data collection form shall indicate the initials of the data collector and the date(s) of the inspection(s).
- g. Where necessary, the CONTRACTOR shall make two (2) call backs, of which one must be on a weekday after 5:00 PM or on a Saturday. The time and date at which the call back

was made shall be duly noted on the data collection form by the data collector making such a call back.

- h. If after two (2) call backs, contact was not established with a property owner, a notification letter approved by the ASSESSOR, shall be mailed by the CONTRACTOR, notifying the property owner that the representatives of the CONTRACTOR were not able to make contact, and requesting that within a prescribed time limit the property owner contact the CONTRACTOR, by telephone or mail, for alternative arrangements for the inspection of the property

III. APPRAISAL SPECIFICATIONS (Continued)

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES (Continued)

2. Exterior Inspections

- a. The perimeter of all improvements shall be carefully reviewed for accuracy against the ASSESSOR's current records.
- b. If it is evident to the data collector that the existing outline sketch, or any part thereof is inaccurate for any reason, the entire improvement shall be remeasured; or if no sketch presently exists, such as for new construction, the improvements shall be measured to the nearest foot.
- c. An outline sketch, prepared to scale, shall be made on site.
- d. Physical data of the parcel shall be recorded on the data collection form at the site.
- e. Existing sketches in the current residential CAMA system and on current commercial and industrial record cards in the Assessor's Office will be made available to the CONTRACTOR for verification.
- f. The CONTRACTOR shall update all physical data including outline sketch on the Vision Appraisal CAMA system.
- g. The CONTRACTOR shall take at least two (2) digital photographs consisting of at least two views of the principle building or structure on each property so that these photos can be copied onto the property record card.

III. APPRAISAL SPECIFICATIONS (Continued)

3. Review

All properties shall be reviewed in the field by the CONTRACTOR'S personnel qualified as reviewers, as previously prescribed in these specifications. The properties shall be reviewed for classification, final value, and to assure that their value is correlated to comparable properties. The ASSESSOR shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation.

4. Pricing and Valuations

Pricing and valuations of all land and buildings must reflect the true and actual value as of October 1, 2015, and shall be done from and in accordance with the previously approved manuals and schedules. The final valuation shall be the true and actual value of the structures plus the fair market value of the land. In arriving at the true and actual 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

All commercial, industrial, public utility and special purpose buildings shall be inspected, both interior and exterior classified, priced and reviewed in the same manner as residential properties as set forth previously in these specifications, except that the dimensions of all buildings shall also include the height, which shall be recorded on the property records card.

2. Description

All buildings shall be identified and described as to component parts of construction, size, area, usage, and present occupant(s) on the proper forms, as previously prescribed in these specifications.

III. APPRAISAL SPECIFICATIONS (Continued)

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 with accompanying summary reports and rent schedules shall become property of the TOWN. All information filed and furnished with the Income and Expense report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information Act) of the Connecticut General Statutes. 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, market and financial 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 CAMA system.

4. Yard and/or Site Improvements

All yard improvements shall be listed and valued separately

5. 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; the final value for which he or she is responsible.

D. CONTROL AND QUALITY CHECKS

1. Field Checks

The ASSESSOR shall spot check in the field, properties picked at random by the ASSESSOR, with or without the appropriate CONTRACTOR'S supervisor.

III. APPRAISAL SPECIFICATIONS (Continued)

2. Building Permits

The ASSESSOR shall screen and make available, on a timely basis, to the CONTRACTOR copies of all building permits issued during the course of the revaluation to allow the inclusion of all new construction, additions, and remodeling in the CONTRACTOR'S appraisals.

3. Incomplete Construction

The CONTRACTOR shall code as unfinished construction all property cards which appear to have incomplete improvements on the October 1, 2015 Grand List. The street card shall show the percentage of completion based upon a schedule approved by the ASSESSOR, and reflect the percentage of completion in the valuation.

4. Sales Analyses

Sales analyses of sold properties 12 months prior to the revaluation date shall be performed as means of substantiating 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, coefficients of dispersion, price-related differential and sold/unsold property test. Any additional requests for sales analyses by the ASSESSOR shall also be performed.

5. Performance Based Revaluation Standards

All fair market values that are developed by the CONTRACTOR must meet the Performance Based Testing Standards developed by the State of Connecticut Office of Policy and Management in accordance with Section 12-62i of the Connecticut General Statutes.

IV. 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 valuations

shall rest with the ASSESSOR.

IV. RESPONSIBILITIES OF THE TOWN (Continued)

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 TOWN Tax Maps that are currently available showing streets and property lines and boundaries.

2. Land Dimensions

The TOWN will make available lot sizes and total acreage to CONTRACTOR of all pieces of property.

3. Zoning

The TOWN will provide current TOWN zoning regulations and zoning maps.

4. Existing Property Record Cards

The TOWN will make available the present field cards.

5. Property Transfers

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.

6. Building Permits

The TOWN shall make available copies of all building permits issued during the course of the revaluation project up to October 1, 2015.

IV. RESPONSIBILITIES OF THE TOWN (Continued)

7. Signing of Communications

The TOWN shall sign, by the ASSESSOR, communications to be mailed at CONTRACTOR'S expense, for the purpose of contacting a property owner for inspection of the property.

8. Mailing Address

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

9. Office Space

The TOWN shall furnish the CONTRACTOR sufficient office space to carry out the terms of this contract. The TOWN will provide office space at the Ellington Town Hall. There will also be space at the same location for meetings and conducting the informal hearings.

10. GIS Data

The TOWN will make available the most current GIS data.

V. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR

1. RECORDS

Regular periodic delivery of appraisals and other information required under this agreement, as completed, and in accordance to a schedule hereinabove set forth or agreeable to the ASSESSOR shall be made to the ASSESSOR for her review. All appraisals of buildings either complete or under construction, shall be completed as of October 1, 2015. All completed and/or corrected records shall be turned over to the ASSESSOR as of December 31, 2015. 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, 2015.

This information and/or appraisals and records shall not be made public until after the

informal public meetings, except to the extent public access may be compulsory under provisions of applicable law.

V. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR (Continued)

It is understood and agreed that the revaluation 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 (Connecticut General Statutes Sec 12-62), shall be acceptable to the ASSESSOR and 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 status and progress of the project and issues that may have come to the attention of either the CONTRACTOR or the ASSESSOR.

2. CAMA SYSTEM

The CONTRACTOR shall update property appraisal data on the CAMA system installed on the TOWN'S computers at least monthly as completed but no later than November 20, 2015.

**END OF SPECIFICATIONS**