

REQUEST FOR PROPOSAL
FOR THE JOINT
REAPPRAISAL AND REVALUATION
OF
ALL REAL PROPERTY (TAXABLE AND EXEMPT)
EFFECTIVE FOR THE FOLLOWING TOWNS:



EAST LYME, CONNECTICUT FOR THE GRAND LIST OF OCTOBER 1, 2021



WATERFORD, CONNECTICUT FOR THE GRAND LIST OF OCTOBER 1, 2022

ISSUED: _____

DUE: FRIDAY, JUNE 19, 2020

SUBMIT PROPOSALS TO:

TOWN OF WATERFORD PURCHASING AGENT
15 ROPE FERRY ROAD
WATERFORD, CT 06385

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REQUEST FOR PROPOSALS

THE PROJECT:

THE REAPPRAISAL AND REVALUATION OF TAXABLE AND TAX EXEMPT REAL PROPERTY WITH THE EXCEPTION OF

THE DOMINION MILLSTONE NUCLEAR POWER STATION FOR THE TOWN OF WATERFORD LOCATED WITHIN THE CORPORATE LIMITS OF THE JOINT TOWNS OF EAST LYME, CT AND WATERFORD, CT

FOR THE FOLLOWING GRAND LISTS: TOWN OF EAST LYME, CONNECTICUT OCTOBER 1, 2021 TOWN OF WATERFORD, CONNECTICUT OCTOBER 1 2022 BID #20-104

Sealed Proposals to perform the subject project in accordance with the specifications enclosed herewith, and made a part of this request, will be received in the Office of the PURCHASING AGENT:

Town of Waterford
15 Rope Ferry Road
Waterford, CT 06385

Until FRIDAY, JUNE 19, 2020 at 3:00 PM EASTERN STANDARD TIME when and where the Proposals will be opened in the presence of the Finance Director, relevant department heads and the Purchasing Agent. Bids can also be sent via email to sealedbids@waterfordct.org on or before the closing date. Electronic submissions will be viewed only at the officially scheduled date and time of opening. All bids will be posted to the Town's website within twenty-four hours of opening. **All questions should be sent to the Purchasing Agent by email at rdummett@waterfordct.org.**

Any Proposal received after said date and time, whether hand-delivered and deposited in the Waterford Town Hall drop box, submitted via US Postal Service, by electronic submission, or submitted via any other delivery service, shall be declared invalid.

All Proposals must include the enclosed and completed PROPOSAL FORM FOR BOTH THE 2021 AND 2022 REVALUATIONS FOR THE APPROPRIATE TOWN, TAX AFFIDAVIT, NON-COLLUSION AFFIDAVIT, EQUAL OPPORTUNITY-AFFIRMATIVE ACTION AFFIDAVIT and REVALUATION CERTIFICATION AFFIDAVIT and be placed in a sealed envelope. The sealed envelope shall be plainly marked "**PROPOSAL FOR JOINT REAPPRAISAL AND REVALUATIONS – TOWN OF EAST LYME AND TOWN OF WATERFORD, BID #20-104**".

All interested parties shall deliver five (5) copies of their Proposal.

Each PROPOSER shall submit with his or her PROPOSAL, a CERTIFIED CHECK or BID BOND in an amount equal to five (5) percent of the total amount of his or her JOINT PROPOSAL. Such check shall be made payable to the **TOWN OF WATERFORD** and shall be conditioned for the acceptance of any award which will be made under the terms of this PROPOSAL.

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

The completion dates through the informal public hearings are as follows:

TOWN OF EAST LYME is DECEMBER 20, 2021
AND
TOWN OF WATERFORD is DECEMBER 19, 2022.

The late-completion penalty is defined in the enclosed CONTRACT SPECIFICATIONS.

The time schedule of the PROJECT is also set forth in the enclosed CONTRACT SPECIFICATIONS.

All questions must be submitted in email to the Purchasing Agent rdummett@waterfordct.org by June 12, 2020

PROPOSERS must conform with all REQUEST FOR PROPOSAL (RFP) instructions and conditions when responding to this RFP. The JOINT TOWNS, at their discretion may reject any non-conforming PROPOSAL. The JOINT TOWNS may also reject any PROPOSAL that materially misrepresents the content of any PROPOSAL.

The JOINT TOWNS reserve the right to amend or cancel this RFP at any time if it is in the best interest of the JOINT TOWNS.

The JOINT TOWNS may make such investigation as deemed necessary to determine the ability of the PROPOSER to perform the work and the PROPOSER shall furnish to the JOINT TOWNS all such data for this purpose. The JOINT TOWNS reserve the right to reject a bid if the evidence submitted by, or investigation of, such PROPOSER fails to satisfy the JOINT TOWNS that such PROPOSER is properly qualified to carry out the obligations of the CONTRACT and to complete the work contained therein.

Conditional bids will not be accepted.

The JOINT TOWNS reserve the right to reject any, or any part of, or all bid proposals; to waive informalities and technicalities; and to accept that bid which the JOINT TOWNS deems to be in the best interest of the JOINT TOWNS, whether or not it is the lowest dollar bid. Bid Prices must be held firm for a period of 120 calendar days beyond the June 19, 2020 submission date.

Withdraw of PROPOSAL: PROPOSALS may be withdrawn by written authorization only and if such withdrawal request is received prior to the specified time of opening.

Robert J. Brule
First Selectman
Town of WATERFORD

Date _____

Mark C. Nickerson
First Selectman
Town of EAST LYME

Date _____

PROPOSAL FORMAT AND CONTENTS

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

- A. PROPOSALS shall be submitted on the appropriate form provided and signed by an authorized agent of the bidder.
- B. Name, telephone number, and **EMAIL ADDRESS**, of person(s) to be contacted for further information and clarification.
- C. Copy of the CONTRACTOR'S current Connecticut Revaluation Certification issued pursuant to the Connecticut General Statutes 12-2c.
- D. Indication of how many years the firm has been engaged as a company, corporation, partnership or individual specializing in municipal revaluation services.
- E. Copy of the CONTRACTORS Financial statement for the last five (5) years.
- F. A Listing of any lawsuits filed against the CONTRACTOR by any Government entity in the last three (3) years for services performed by the CONTRACTOR. A Listing of any cases under investigation or review in the last five (5) years by the Attorney General's Office or the Connecticut Office of Policy and Management or similar agency in another State.
- G. Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number, size of the municipality, scope of services rendered and date completed.
- H. 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. The CONTRACTOR may provide a one (1)-page summary of the CONTRACTOR'S advantages and strengths in performing the JOINT revaluation projects.
- I. Listing of personnel to be assigned to each TOWN'S revaluation, including years of experience in current positions and other revaluation positions, municipalities served and their roles in those revaluations.
- J. Bid bond or Certified Check for Five percent (5%) of the Total project submitted. Bid Bond to be in the name of Town of Waterford.
- K. The CONTRACTOR must submit as part of the PROPOSAL FORM(S), a schedule and percentage of completed work, based upon the CONTRACT'S SPECIFICATIONS, as set forth in the CONTRACT SPECIFICATIONS on the enclosed form.
- L. The CONTRACTOR must submit a PROPOSAL for the PROJECT as outlined in the CONTRACT and CONTRACT SPECIFICATIONS.
- M. The CONTRACTOR will use the TOWN OF EAST LYME'S existing V8 CAMA software as provided by Vision Government Solutions Inc. The CONTRACTOR shall be responsible for obtaining at its sole expense, any software, software support, updates or licensing required to complete the PROJECT.

The CONTRACTOR will use the TOWN OF WATERFORD'S existing V8 CAMA Software as provided by Vision Government Solutions Inc. The CONTRACTOR shall be responsible for obtaining at its sole expense, any software, software support, updates or licensing required to complete the PROJECT.

- N. PROPOSALS shall be submitted accompanied by the TAX AFFIDAVIT, NON-COLLUSION AFFIDAVIT, EQUAL EMPLOYMENT-AFFIRMATIVE ACTION AFFIDAVIT and REVALUATION CERTIFICATION AFFIDAVIT.
- O. Description of the CONTRACTOR'S revaluation public relations program.
- P. The JOINT TOWNS are also interested in the use of the Internet for purposes of sharing data with the public. The CONTRACTOR should include their Internet solution as part of this PROPOSAL.
- Q. Data mailers will be considered as part of this PROPOSAL. Therefore a comprehensive quality control plan is required and shall be submitted as part of this PROPOSAL for each of the JOINT TOWNS with each Town independently reserving the right to exclude this item from the final contract.
- R. **STAFFING:** This PROPOSAL is based upon the CONTRACTOR providing data input and also providing field collection of sales parcels and building permits. The Town may want to provide partial staffing on site to complete some of the data input or Field collection services. The CONTRACTOR may provide options in their PROPOSAL to facilitate this process.
- S. **OPTIONS:**
Options are additional services and/or products not specifically requested and/or included in this PROPOSAL. These are services and/or products (for an additional cost) that the CONTRACTOR is prepared to offer in addition to those services specified in this PROPOSAL. These Optional Services and or products shall be itemized on the bid form included.

Option 1

FULL INSPECTION: The CONTRACTOR shall, as a separate option, list the dollar amount, which will be billable by the CONTRACTOR for the completion of a full revaluation of all real estate to include data mailers and interior and exterior inspections of the following property categories for each of the JOINT TOWNS using the towns' existing CAMA software. The exception being the Dominion Millstone Nuclear Power Station located in the town of Waterford.

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

Option 2

IMAGING: The CONTRACTOR shall, as a separate option, list the dollar amount, which will be billable by the CONTRACTOR for new digital photographs (commonly referred to as "images") of all improved Real Estate in each of the TOWNS. Such digital photographs shall be integrated with and compatible with each TOWN'S existing CAMA database and shall provide each TOWN with the ability to randomly retrieve an image of any improvement described on the CAMA database. The quoted price for this option shall include the cost of all hardware and software necessary to maintain the imaging process and training. The completion date for imaging shall be November 15, 2021 for the Town of East Lyme and November 15, 2022 for the Town of Waterford.

INFORMATION AND GENERAL REQUIREMENTS TO BIDDERS

1. Sealed bids **(one original and four copies)** on the attached Bid Forms will be received at the Office of the Purchasing Agent, Town Hall, 15 Rope Ferry Rd Waterford, Connecticut 06385. At the designated time of opening, they will be opened, read, recorded and placed on file in the presence of the Finance Director, relevant department heads, and the Purchasing Agent. Bids must be submitted in a sealed envelope that is clearly marked **SEALED BID FOR Name of Bid with bid number, time of bid opening and date**. Bids may be mailed or deposited in the drop box located at the rear entrance of the Waterford Town Hall. Bids may also be sent via email to sealedbids@waterfordct.org. Bids are to be addressed to the Finance Office, Purchasing Agent Town of Waterford, 15 Rope Ferry Road, Waterford, CT 06385, where they will be opened in the presence of the Finance Director, relevant department heads and the Purchasing Agent. Bid results will be posted to the Town's website within twenty-four hours of opening.
2. Whenever it is deemed to be in the best interest of the Towns, the Boards of Selectmen shall have the right to accept or reject any bid, or any part of any bid, when such action is deemed to be in the best interest of the Towns' of Waterford and East Lyme.
3. Proposals will be evaluated based upon criteria to include, but not limited to, the following:
 - a.) Directness of response to the specifications.
 - b.) Cost of the project will be considered, but will not be the sole basis for evaluation. Respondents must demonstrate that they are qualified and responsible as well.
 - c.) Prior experience.
 - d.) Nature and size of Respondent's organization and familiarity with the area.
 - e.) Quality of similar projects Respondent has completed in the past.
 - f.) Project timetable.
 - g.) Range of completeness of the public information program.
4. Bids will be carefully evaluated as to conformance with stated specifications.
5. The envelope enclosing your bid should be clearly marked on its front by bid number, time of bid opening and date.
6. Specifications must be submitted complete in every detail, and when requested, samples shall be provided. If a bid involves any exception from stated specifications, they must be clearly noted as exceptions, underlined, and attached to the bid.
7. The Bid Documents contain the provisions required for the requested item. Information obtained from an officer, agent, or employee of the Towns' or any other person shall not affect the risks or obligations assumed by the Bidder or relieve him/her from fulfilling any of the conditions of the Bid.
8. Each bidder is held responsible for the examination and/or to have acquainted themselves with any conditions at the job site which would affect their work before submitting a bid. Failure to meet these criteria shall not relieve the Bidder of the responsibility of completing the Bid without extra cost to the Town of Waterford or Town of East Lyme.

9. Any bid may be withdrawn prior to the above scheduled time for the opening of bids or authorized postponement thereof. Any bid received after the time and date specified shall not be considered. No bidder may withdraw a bid within one hundred and twenty (120) days after the actual date of the opening thereof. Should there be reasons why a Bid cannot be awarded within the specified period; the time may be extended by mutual agreement between the Town's and the bidder.
10. Each bid must be accompanied by a bid bond payable to the Town of Waterford for five percent (5%) of the total amount of the bid. The bid bond of the successful bidder will be retained until the payment bond and performance bond have been executed and approved, after which it will be returned. A certified check may be used in lieu of a bid bond. The Town of Waterford will not be liable for the accrual of any interest on any certified check submitted.
11. A 100% Performance and Payment bonds are required of the successful bidder. This bond shall cover all aspects of the specification and shall be delivered to the Purchasing Agent prior to the issuance of a purchase order. This submission must be received within five days of contract award. Bonds must meet the following requirements: Corporation - must be signed by an official of the corporation above their official title and the corporate seal must be affixed over the signature; Firm or Partnership - must be signed by all the partners and indicate they are "doing business as"; Individual - must be signed by the owner and indicated as "Owner". The surety company executing the bond or countersigning must be licensed in Connecticut and an official of the surety company must sign the bond with the corporate seal affixed over their signature. Signatures of two witnesses for both the principal and the surety must appear on the bond. Power of attorney for the official signing the bond for the surety company must be submitted with the bond. The Performance and Payment Bonds will be returned upon completion and acceptance of the job.
12. The bidder agrees and warrants that in the submission of this sealed bid, they will not discriminate or permit discrimination against any person or group of persons on the grounds of race, color, religion, national origin, sex, or physical disability including, but not limited to blindness, unless it is shown by such bidder that such disability prevents performance of that which must be done to successfully fulfill the terms of this sealed bid or in any manner which is prohibited by the laws of the United States or the State of Connecticut: and further agrees to provide the Human Relations Commission with such information requested by the Commission concerning the employment practices and procedures of the bidder. An Affirmative Action Statement will be required by the successful bidder.
13. Bidder agrees to comply with all of the latest Federal and State Safety Standards and Regulations and certifies that all work required in this bid will conform to and comply with said standards and regulations. Bidder further agrees to indemnify and hold harmless the Town for all damages assessed against the Town's as a result of Bidder's failure to comply with said standards and/or regulations.
14. The Towns of Waterford and East Lyme are exempt from Excise, Transportation and Sales taxes imposed by the Federal Government and/or State of Connecticut. Such taxes must not be included in proposal prices. Exemption certificates will be provided upon request.
15. By submitting a proposal, Vendors certify that the proposal is made independently and without collusion, agreement, understanding, or planned course of action with any other Vendor and that the contents of the proposal shall not be disclosed to anyone other than their employees, agents, or sureties prior to the official opening.

16. Vendors shall observe and comply with all Federal, State and local laws, ordinances and regulations. Vendors shall indemnify and save harmless the Town, all of its officers, agents and servants against any claim or liability arising from or based on the violation of any such law, ordinance, regulation or negligence whether by the bidder, his employees, his consultant and/or their employees.
17. Bidders are responsible for checking the Town of Waterford website at <http://www.waterfordct.org/depts/finance/purchasing.htm> for any addendums and updates to the Bid.

Rights Reserved To the Town

The Towns' reserve the right to award in part, to reject any and all, in whole or in part, for misrepresentation or if the respondent is in default of any prior Town's contract, or if the Respondent limits or modifies any of the terms and conditions and/or specifications of the Request The Towns' also reserve the right to waive technical defects, irregularities and omissions if, in the Towns' judgment, the best interest of the Towns' will be served.

Additional Information:

All Questions must be submitted in writing to the Purchasing Agent via email at rdummett@waterfordct.org by June 12, 2020.

INSURANCE

The bidder shall, at its own expense and cost, obtain and keep in force during the entire duration of the Project or Work the following insurance coverage covering the bidder and all of its agents, employees and sub-contractors and other providers of services and shall name the **Town of Waterford and the Town of East Lyme, its employees and agents as an Additional Insured** on a primary and non-contributory basis to the bidders Commercial General Liability and Automobile Liability policies. **These requirements shall be clearly stated in the remarks section on the bidders Certificate of Insurance.**

INSURANCE REQUIREMENTS - Within five days of contract award, the awarded vendor shall provide a Certificate of Insurance in accordance with the following requirements:

1. Insurers must have an A.M. best rating of A-VII or better and admitted to conduct business in the State of Connecticut.
2. General Liability:
 - a. Bodily Injury and Property Damage - \$1,000,000/Occurrence
 - b. Products/Completed Operations Aggregate Bodily Injury and Property Damage – \$2,000,000
 - c. Commercial General Liability
 - d. Products & Completed Operations
3. Automobile Liability:
 - a. \$1,000,000 Joint Single Limit
 - b. Owned, Hired and Non-Owned
4. Workers' Compensation as required by the State of Connecticut
5. Commercial Umbrella - \$2,000,000 Limit
6. Professional Errors and Omissions Liability - \$1,000,000 Limit
7. Name the appropriate Town as Additional Insured
8. 30 Day Notice of Cancellation
9. Subcontractors: It is the responsibility of the Contractor to be sure that all their subcontractors procure and maintain the same insurance required of the Contractor.

The bidder shall direct its Insurer to provide a Certificate of Insurance to the Towns of Waterford and East Lyme before any work is performed. The Certificate shall specify that the Town of Waterford and the Town of East Lyme shall receive 30 days advance written notice of cancellation or non-renewal. The Certificate shall evidence all required coverage including the Additional Insured and Waiver of Subrogation.

Each Town must receive its own independent Certificate of Insurance by work project on file prior to commencement of work.

past in Connecticut, other projects and/or revaluations currently under contract by the CONTRACTOR, and a determination by the JOINT TOWN'S that the CONTRACTOR has the ability to complete the revaluation successfully.

H. **EAST LYME** Payment schedule for percentage of completed work. This schedule is to be completed by the CONTRACTOR for each individual TOWN.

	Stages of Completion	Percent of Total Cost
1	Bonding, Office Set-Up and Project Start-Up	_____ %
2	Data Collection and Verification – Residential	_____ %
3	Data Collection and Verification – Commercial, Industrial, Exempt	_____ %
4	Data Mailer	_____ %
5	Valuation Analysis – Land Study	_____ %
6	Valuation Analysis – Building Cost	_____ %
7	Valuation Analysis – Income and Expense Statements	_____ %
8	Field Review – Residential	_____ %
9	Field Review – Commercial, Industrial, Exempt	_____ %
10	Final Valuations – Residential	_____ %
11	Final Valuations – Commercial, Industrial, Exempt	_____ %
12	Final Valuation – Properties that have changed since final value including properties with building permits	_____ %
13	Assessment Notice	_____ %
14	Informational Hearings Completed and Final Adjustments	_____ %
15	Training of Board of Assessment Appeals Members	_____ %
16	Board of Assessment Appeals Completion	_____ %
17	Litigation	_____ %

WATERFORD Payment schedule for percentage of completed work. This schedule is to be completed by the CONTRACTOR for each individual TOWN.

Stages of Completion		Percent of Total Cost
1	Bonding, Office Set-Up and Project Start-Up	_____ %
2	Data Collection and Verification – Residential	_____ %
3	Data Collection and Verification – Commercial, Industrial, Exempt	_____ %
4	Data Mailer	_____ %
5	Valuation Analysis – Land Study	_____ %
6	Valuation Analysis – Building Cost	_____ %
7	Valuation Analysis – Income and Expense Statements	_____ %
8	Field Review – Residential	_____ %
9	Field Review – Commercial, Industrial, Exempt	_____ %
10	Final Valuations – Residential	_____ %
11	Final Valuations – Commercial, Industrial, Exempt	_____ %
12	Final Valuation – Properties that have changed since final value including properties with building permits	_____ %
13	Assessment Notice	_____ %
14	Informational Hearings Completed and Final Adjustments	_____ %
15	Training of Board of Assessment Appeals Members	_____ %
16	Board of Assessment Appeals Completion	_____ %
17	Litigation	_____ %

I. That the CONTRACTOR proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid Contract Specifications for the total amount of:

EAST LYME

\$ _____
AMOUNT WRITTEN DOLLAR AMOUNT

J. OPTION 1 \$ _____
FULL INSPECTION AMOUNT WRITTEN DOLLAR AMOUNT

OPTION 2 \$ _____
IMAGE AMOUNT WRITTEN DOLLAR AMOUNT

K. That the offer specified in Item I and J above is/are valid until (at least 120 days beyond the submission of this proposal) the following date June 19, 2020.

FIRM NAME OF PROPOSER: _____

BY SIGNATURE: _____

CONTACT PERSON: _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

I. That the CONTRACTOR proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid Contract Specifications for the total amount of:

WATERFORD

\$ _____
AMOUNT WRITTEN DOLLAR AMOUNT

J. OPTION 1 \$ _____
FULL INSPECTION AMOUNT WRITTEN DOLLAR AMOUNT

OPTION 2 \$ _____
IMAGE AMOUNT WRITTEN DOLLAR AMOUNT

K. That the offer specified in Item I and J above is/are valid until (at least 120 days beyond the submission of this proposal) the following date June 19, 2020.

FIRM NAME OF PROPOSER: _____

BY SIGNATURE: _____

CONTACT PERSON: _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

TAX AFFIDAVIT

The undersigned, being duly sworn, deposes and says:

01. I am over the age of eighteen (18) and believe in the obligations of an oath.
02. I, on my own behalf or on behalf of my company, am submitting a bid, quotation or proposal to the JOINT TOWNS, TOWN OF EAST LYME and TOWN OF WATERFORD.
03. I understand that the submission of this affidavit is required by the JOINT TOWNS, TOWN OF EAST LYME and the TOWN OF WATERFORD in connection with my bid, quotation or proposal and that the JOINT TOWNS EAST LYME and WATERFORD Board of Selectmen may consider the information contained in this affidavit in making the contract award.
04. I have performed an investigation to determine whether I, or my company (as applicable) owes any delinquent state, local or federal tax.
05. Based upon my investigation, and to the best of my knowledge and belief, I or my company (as applicable) owe to the following governmental unit(s) the following delinquent tax(es): (Describe the nature of each delinquent tax, approximate amount of same and governmental unit to which delinquent tax is owed. If a delinquent tax(es) is not owed, then insert the word "None").

Company Name

Signature

Print Name & Title

Date

Subscribed and sworn to before me this _____ day of _____, 2020

Notary

My commission expires _____

NON-COLLUSION AFFIDAVIT

State of: _____

County of: _____

_____, being first duly sworn, deposes and says that:

1. He/She is _____ of _____, the COMPANY that has submitted the attached proposal.
2. He/She is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal.
3. Such price is genuine and is not a collusive or sham proposal.
4. Neither the said COMPANY nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affidavit, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other company, firm or person to submit a collusive or sham proposal in connections with the CONTRACT for which the attached proposal has been submitted or to refrain from proposing in connections with such CONTRACT, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other COMPANY, firm or person to fix the price or prices in the attached proposal or of any other proposer, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any proposal, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the JOINT TOWNS, TOWN OF EAST LYME and the TOWN OF WATERFORD, or any person interested in the proposed CONTRACT.
5. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the COMPANY or any of its agents, representatives, owners, employees or parties in interest, including this affidavit.

Signed _____ Title _____

Subscribed and sworn to before me this _____ day of _____, 2020.

Notary My commission expires _____

EQUAL OPPORTUNITY - AFFIRMATIVE ACTION AFFIDAVIT CERTIFICATION OF COMPANY

Each COMPANY with ten (10) or more employees shall complete the Certification of Company which is included as part of these specifications. COMPANIES with less than ten (10) employees should indicate this on the Certification and return it with their RFP.

A signature on the form certifies that the COMPANY is declaring that it does not discriminate on the basis of race, color, sex, national origin, age, disability, etc.

TOWN OF EAST LYME and TOWN OF WATERFORD, CERTIFICATION OF COMPANY

Concerning Equal Employment Opportunities and/or Affirmative Action Policy:

The COMPANY certifies that:

- 1) It is in compliance with the equal opportunity clause as set forth in the Connecticut State Law.
- 2) It does not maintain segregated facilities.
- 3) It has filed required employer's information reports.
- 4) It lists job openings with Federal and State Employment Services.
- 5) It is in compliance with the Americans with Disabilities Act.

Check Appropriate One:

_____ Yes, the COMPANY certifies to having an Affirmative Action Program.

_____ Not applicable, the COMPANY employs ten (10) or less people.

Company Name

Signature

Print Name & Title

Date

Subscribed and sworn to before me this _____ day of _____, 2020.

Notary My commission expires _____

REVALUATION CERTIFICATION AFFIDAVIT

The undersigned, being duly sworn, deposes and says:

01. I am over the age of eighteen (18) and believe in the obligations of an oath.
02. I, on my own behalf or on behalf of my company, am submitting a bid, quotation or proposal to the JOINT TOWNS, TOWN OF EAST LYME and the TOWN OF WATERFORD.
03. I understand that the submission of this affidavit is required by the JOINT TOWNS, TOWN OF EAST LYME and the TOWN OF WATERFORD in connection with my bid, quotation or proposal and that the JOINT TOWNS, EAST LYME and WATERFORD Board of Selectman may consider the information contained in this affidavit in making the contract award.
04. I have performed an investigation to determine whether I or my company (as applicable) are, as of this date, being investigated as defined in Section 12-2b of the Connecticut General Statutes.

CHECK ONLY ONE OF THE FOLLOWING:

- Based upon my investigation, and to the best of my knowledge and belief, I or my company (as applicable) are **not** being investigated as of this date (as defined in Section 12-2b of the Connecticut General Statutes).
- Based upon my investigation, and to the best of my knowledge and belief, I or my company (as applicable) are, as of this date, being investigated as defined in Section 12-2b of the Connecticut General Statutes.

Company Name

Signature

Print Name & Title

Date

Subscribed and sworn to before me this _____ day of _____, 2020.

Notary

My commission expires _____

SCOPE AND SPECIFICATIONS

01. GENERAL PROVISIONS

A. SCOPE OF REAPPRAISAL AND REVALUATION

This PROJECT, which is called revaluation, includes the complete reappraisal and revaluation of all real property (taxable and exempt) within the corporate limits of the Town of EAST LYME effective as of October 1, 2021

AND

Town of WATERFORD, Connecticut effective as of October 1, 2022 with the exception of:

Real and Personal Property that makes up the Dominion Millstone Nuclear Power Station

The PROJECT will cover and include all real property in the JOINT TOWNS, excepting the Dominion Millstone Nuclear Power Station, located in WATERFORD but including the following categories:

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

All physical improvements shall be inspected, measured and listed for those properties that

- a) sold between October 1, 2019 (inclusive) and October 1, 2021 (inclusive), in EAST LYME
- b) sold between October 1, 2020 (inclusive) and October 1, 2022 (inclusive), in WATERFORD
- c) have less than 100% construction (as of October 1, 2020) on the ASSESSOR'S field cards in EAST LYME,
- d) have less than 100% construction (as of October 1, 2021) on the ASSESSOR'S field cards in WATERFORD,
- e) have an open building permit or permits
- f) no returned data mailer, completed by the residential property owner was received,
- g) a returned data mailer was received that reflects a change in construction detail
- h) certain other properties as selected by the RESPECTIVE ASSESSOR.

The PROJECT shall not include the valuation of personal property.

The CONTRACTOR shall value all newly constructed improvements created prior to October 1, 2021 (EAST LYME) and October 1, 2022 (WATERFORD), or those incomplete as of the valuation dates, and these parcels shall be included in the contract price, and valued in the same manner as provided hereinafter.

CONTRACTOR shall furnish all the databases, 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, materials, and supplies utilized in this project shall conform to and be carried out in accordance with the requirements of the Secretary of the Office of Policy and Management, the Connecticut General Statutes, and Regulations of Connecticut State Agencies pertaining hereto, and shall be subject to the direct supervision and approval of the RESPECTIVE ASSESSOR.

This PROJECT shall comply with the Performance-Based Testing Standards Section 12-62i of the Connecticut General Statutes (and as amended from time to time).

The values to be determined shall be the full fair market value (as of October 1, 2021 - EAST LYME and as of October 1, 2022 - WATERFORD) as defined in Section 12-63 of the Connecticut General Statutes and shall be based upon recognized methods of mass appraisal.

Assessments shall be seventy percent (70%) of the October 1, 2021 (EAST LYME) and October 1, 2022 (WATERFORD) market value rounded to the nearest ten dollars.

The CONTRACTOR will use the Town of EAST LYME'S existing CAMA software as provided by Vision Government Solutions Inc. The CONTRACTOR will use the Town of WATERFORD'S existing CAMA software as provided by Vision Government Solutions Inc.

Any data conversion in the JOINT TOWNS is the sole responsibility of the CONTRACTOR.

All data entry in the JOINT TOWNS will be the responsibility of the CONTRACTOR.

B. EFFECTIVE DATE/ASSESSMENT DATE

The effective date of this PROJECT shall be for the October 1, 2021 Grand List for EAST LYME and October 1, 2022 for WATERFORD. The pricing and valuation by the CONTRACTOR of all land, buildings and property under this CONTRACT shall reflect the fair market value as of October 1, 2021 for EAST LYME and October 1, 2022 for WATERFORD.

The completed appraisals, upon approval of the RESPECTIVE ASSESSOR, will serve as the basis for the assessments on the October 1, 2021 Grand List for EAST LYME and the October 1, 2022 Grand List for WATERFORD.

C. TOWN DATA

EAST LYME

Date of Last Revaluation.....October 1, 2016
Type.....Valuation Update
Number of Special Districts.....None
Estimated Population.....18,690
Area of the Town of EAST LYME (Square miles)34.85
Form of Government.....Board of Selectman

WATERFORD

Date of Last Revaluation.....October 1, 2017
Type.....Valuation Update
Number of Special Districts.....None
Estimated Population.....18,907
Area of the Town of WATERFORD (Square miles)36.70
Form of Government.....Board of Selectman

B. PARCEL COUNT

EAST LYME

It is the responsibility of the CONTRACTOR to estimate adjustments in parcel counts from the estimated parcel counts stated below for the October 1, 2019 Grand List, to the actual parcel counts for the October 1, 2021 Grand List.

The TOWN shall not permit additional charges by the CONTRACTOR for differences in parcel counts.

NUMBER OF ACCOUNTS AS OF OCTOBER 1, 2019

<u>PROPERTY CLASS</u>	<u>TOTAL PARCELS</u>
Residential	6744
Apartments (5+ units)	30
Condos	1205
Vacant Land (Residential, Commercial & Exempt)	692
Commercial	277
Industrial	22
Public Utility	13
Farm	36
Forest	52
Open Space	8
Ten Mill Forest	1
Exempt (Residential/Commercial- Improved)	296
TOTAL PARCELS	9376
Exempt Properties Improved	Included above
Exempt Properties Vacant	Included above
TOTAL IMPROVED PARCELS	8684
PARCELS TO BE INSPECTED	3474

WATERFORD

It is the responsibility of the CONTRACTOR to estimate adjustments in parcel counts from the estimated parcel counts stated below for the October 1, 2019 Grand List, to the actual parcel counts for the October 1, 2022 Grand List.

The TOWN shall not permit additional charges by the CONTRACTOR for differences in parcel counts.

NUMBER OF ACCOUNTS AS OF OCTOBER 1, 2019

<u>PROPERTY CLASS</u>	<u>TOTAL PARCELS</u>
Residential	7441
Apartments (5+ units)	10
Condos	745
Vacant Land (Residential, Commercial & Exempt)	820
Commercial	304
Industrial	46
Public Utility	0
Farm	10
Forest	73
Open Space	40
Exempt (Residential/Commercial- Improved)	83
TOTAL PARCELS	9572
Exempt Properties Improved	Included above
Exempt Properties Vacant	Included above
TOTAL IMPROVED PARCELS	8752
PARCELS TO BE INSPECTED	3501

02. RESPONSIBILITIES OF THE CONTRACTOR

A. REVALUATION CERTIFICATE OF THE COMPANY

The CONTRACTOR, must hold from the time of submission of the PROPOSAL through the completion of all work herein required, a valid Connecticut Revaluation Company Certification pursuant to section 12-2c (CGS).

In addition to submitting a copy of the CONTRACTOR'S Connecticut Revaluation Company Certificate with their PROPOSAL, the CONTRACTOR shall promptly notify the RESPECTIVE ASSESSOR if and when there are any complaints, pursuant to Section 12-2b-18 (CGS) filed with the Office of Policy and Management.

B. TIME SCHEDULE

The CONTRACTOR shall commence the PROJECT no later than AUGUST 3, 2020 in EAST LYME and DECEMBER 31, 2020 in WATERFORD and shall continue uninterrupted in a diligent fashion so as to ensure completion within the schedule of the completion dates herein set forth:

EAST LYME

COMMENCEMENT DATE NO LATER THAN	August 3, 2020
DATA MAILERS MAILED NO LATER THAN	January 4, 2021
MAIL M-58 FORM NO LATER THAN	March 1, 2021
DATA MAILERS TO BE RETURNED NO LATER THAN	March 1, 2021
PRELIMINARY LAND STUDY AND VALUES COMPLETED NO LATER THAN	May 3, 2021
PRELIMINARY BUILDING COST MANUAL COMPLETED NO LATER THAN	May 3, 2021
ALL INSPECTIONS NECESSITATED BY THE DATA MAILERS COMPLETED NO LATER THAN	June 1, 2021
M-58 FORMS TO BE RETURNED NO LATER THAN	June 1, 2021
ANALYSIS OF INCOME AND EXPENSE FORMS COMPLETED NO LATER THAN	July 30, 2021
COMPLETED COMMERCIAL APPRAISALS DELIVERED TO ASSESSOR NO LATER THAN	October 1, 2021
ASSESSMENT DATE	October 1, 2021
SALES VERIFICATION COMPLETED NO LATER THAN	October 8, 2021
COMPLETED RESIDENTIAL APPRAISALS DELIVERED TO ASSESSOR NO LATER THAN	October 15, 2021
PRELIMINARY PERFORMANCE STANDARD REPORT SUBMITTED TO ASSESSOR NO LATER THAN	October 22, 2021
REVIEW COMPLETED BY ASSESSOR NO LATER THAN	November 19, 2021
ASSESSMENT NOTICES MAILED NO LATER THAN	November 22, 2021
INFORMAL HEARINGS HELD NO LATER THAN	December 1, thru December 22, 2021
ALL INSPECTIONS NECESSITATED BY THE INFORMAL HEARINGS COMPLETED NO LATER THAN	December 31, 2021
RESULTS OF THE INFORMAL HEARING MAILED AND DATA ENTERED NO LATER THAN	January 07, 2022
FINAL AND SIGNED PERFORMANCE STANDARD REPORT SUBMITTED TO ASSESSOR NO LATER THAN	January 07, 2022
TRANSMITTAL OF ALL DELIVERABLES TO THE ASSESSOR NO LATER THAN	January 07, 2022

WATERFORD

COMMENCEMENT DATE NO LATER THAN	DECEMBER 31, 2020
DATA MAILERS MAILED NO LATER THAN	January 3, 2022
MAIL M-58 FORM NO LATER THAN	February 1, 2022
DATA MAILERS TO BE RETURNED NO LATER THAN	March 1, 2022
PRELIMINARY LAND STUDY AND VALUES COMPLETED NO LATER THAN	April 1, 2022
PRELIMINARY BUILDING COST MANUAL COMPLETED NO LATER THAN	April 1, 2022
ALL INSPECTIONS NECESSITATED BY THE DATA MAILERS COMPLETED NO LATER THAN	June 1, 2022
M-58 FORMS TO BE RETURNED NO LATER THAN	June 1, 2022
ANALYSIS OF INCOME AND EXPENSE FORMS COMPLETED NO LATER THAN	July 29, 2022
COMPLETED COMMERCIAL APPRAISALS DELIVERED TO ASSESSOR NO LATER THAN	October 1, 2022
ASSESSMENT DATE	October 1, 2022
SALES VERIFICATION COMPLETED NO LATER THAN	October 12, 2022
COMPLETED RESIDENTIAL APPRAISALS DELIVERED TO ASSESSOR NO LATER THAN	October 19, 2022
PRELIMINARY PERFORMANCE STANDARD REPORT SUBMITTED TO ASSESSOR NO LATER THAN	October 26, 2022
REVIEW COMPLETED BY ASSESSOR NO LATER THAN	November 18, 2022
ASSESSMENT NOTICES MAILED NO LATER THAN	November 23, 2022
INFORMAL HEARINGS HELD NO LATER THAN	December 1 thru December 23, 2022
ALL INSPECTIONS NECESSITATED BY THE INFORMAL HEARINGS COMPLETED NO LATER THAN	December 31, 2022
RESULTS OF THE INFORMAL HEARING MAILED AND DATA ENTERED NO LATER THAN	January 7, 2023
FINAL AND SIGNED PERFORMANCE STANDARD REPORT SUBMITTED TO ASSESSOR NO LATER THAN	January 7, 2023
TRANSMITTAL OF ALL DELIVERABLES TO THE ASSESSOR NO LATER THAN	January 7, 2023

C. PERSONNEL

01. GENERAL

The CONTRACTOR shall provide experienced and qualified personnel, as hereinafter provided and must comply with the requirements of the Equal Employment Opportunity provisions of federal and state government.

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

All personnel assigned to this PROJECT shall be certified by the State of Connecticut at the appropriate level at which they will be working on this PROJECT.

At the commencement of the PROJECT, the CONTRACTOR shall submit to the RESPECTIVE TOWN a written list of all personnel assigned to this PROJECT with their duties, starting date and qualifications and shall maintain this list throughout this PROJECT. Any changes to the project team must be submitted in writing and approved by the respective Assessors.

Additionally, the CONTRACTOR shall provide the RESPECTIVE ASSESSOR with a copy of the Connecticut Certificate of each person required to be certified in accordance with Section 12-2b of the Connecticut General Statutes and who shall be assigned to this PROJECT. Those personnel shall provide the Certificates prior to any actual work on this PROJECT.

The CONTRACTOR **shall not allow** any on the job training of their new employees in the JOINT TOWNS while the PROJECT is underway without the consent of the RESPECTIVE ASSESSOR.

A dress code (subject to the ASSESSOR'S approval) must be developed by the CONTRACTOR and adhered to.

02. PROJECT MANAGER OR SUPERVISOR

The CONTRACTOR shall assign administration of this PROJECT to a Project Manager or Supervisor who shall be identified in the PROPOSAL. He/She shall be certified by the State of Connecticut pursuant to Section 12-2c (CGS) as a Connecticut Revaluation Supervisor and shall have not less than five (5) years of practical appraisal experience involving extensive experience on commercial, industrial, apartment, and residential type properties. A listing of the projects he/she has worked on over the past five (5) years and the specific duties of each project shall be provided. This PROJECT Manager or Supervisor shall be subject to the approval of the RESPECTIVE ASSESSOR.

The PROJECT Manager or Supervisor shall be responsible for all work performed by the CONTRACTOR.

The PROJECT Manager or Supervisor may also be required to work in conjunction with a real estate appraisal consultant who will help him/her establish land values, cost tables, market rents, and capitalization rates.

The PROJECT Manager or Supervisor, will be responsible to the RESPECTIVE ASSESSOR, and at regular intervals, to be determined by the RESPECTIVE ASSESSOR, will meet with the RESPECTIVE ASSESSOR to discuss the progress and various details of the project. The PROJECT Manager or Supervisor shall show proof of experience and competency with the CAMA software.

The same PROJECT Manager or Supervisor will be assigned to the JOINT TOWNS for the duration of the valuation, except for illness or severe disability, or other circumstances recognized by the RESPECTIVE TOWN.

03. SENIOR COMMERCIAL APPRAISER

The Senior Commercial Appraiser shall be certified under Connecticut Revaluation Program and shall not have less than seven (7) years of practical experience in the appraisal of commercial, industrial and special use property appraisal.

04. REVIEWERS AND APPRAISERS

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program pursuant to Section 12-2c of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time, and shall not have less than three (3) years of practical appraisal experience in the appraisal of the particular type of properties for which they are responsible. Two (2) years of this experience shall have been in the mass appraisal field and shall have occurred within the past five (5) years. All reviewers and appraisers shall be subject to the approval of the RESPECTIVE ASSESSOR prior to the commencement of their duties on the PROJECT in the RESPECTIVE TOWN.

05. MEASURERS AND LISTERS

Measurers and Listers shall have no less than one (1) year of experience and training in this phase of a revaluation project. Any field person who does not meet the above qualifications must work under the direct supervision of an Appraiser, Reviewer, PROJECT Manager or Supervisor, who is certified pursuant to Section 12-2c Connecticut General Statutes. The PROJECT Manager or Supervisor is required to notify the RESPECTIVE ASSESSOR of the names, starting dates, qualifications, and field assignments of all Measurers and Listers. The minimum age for Measurers and Listers shall be twenty-one (21) years of age.

The CONTRACTOR must exercise extreme vigilance over the instruction and supervision of the Measurers and Listers, emphasizing the absolute necessity for the Measurers and Listers to help establish a good relationship with the property owners.

The Project Manager or Supervisor and Measurers and Listers shall work closely with the RESPECTIVE ASSESSOR to assure accuracy and reliability of the data collection.

The CONTRACTOR shall give all personnel clear and unequivocal instruction that they shall not discuss with any property owner or property occupant in the JOINT TOWNS, the value or the assessment of any property they inspect, the property taxes being paid on the property being inspected, or any aspect of the local budget or various RESPECTIVE TOWN issues or political matters.

06. IDENTIFICATION OF THE COMPANY'S EMPLOYEES

All field personnel have visible clip-on or neck lanyard with identification card, 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.

Any personnel who misplace their ID card will not be allowed in the field until a new ID card is obtained.

All automobiles used by field personnel shall be registered with the RESPECTIVE TOWN Police Department and the RESPECTIVE ASSESSOR, giving license number, make, model, year and color of the vehicle.

The CONTRACTOR'S name will be visible on the vehicle.

All personnel shall be subject to a background check by the Police Department of the RESPECTIVE TOWN.

07. CONFLICT OF INTEREST

The CONTRACTOR without prior approval of the RESPECTIVE ASSESSOR shall not employ any resident of the TOWN or TOWN employee.

08. CONDUCT OF COMPANY EMPLOYEES

As a condition of this CONTRACT, the CONTRACTOR'S employees shall, at all times, treat the residents, employees and taxpayers of the TOWN with respect and courtesy.

The CONTRACTOR shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision.

09. RELEASE OR TRANSFER OF COMPANY'S EMPLOYEES

Whenever any person who is employed by the CONTRACTOR and assigned to this PROJECT is released from employment, or transferred from this PROJECT, the RESPECTIVE ASSESSOR shall be notified in writing of the individual's name, date of occurrence and reason for release or reassignment.

D. PUBLIC RELATIONS/PUBLIC INFORMATION PROGRAM

Public relations shall be an important part of the revaluation PROJECT. The parties to this CONTRACT recognize that a good public relations program is required in order that the public is informed as to the purpose, benefits and procedures of this PROJECT.

Adequate public understanding of the revaluation program is essential to its success. Therefore the CONTRACTOR must be prepared to conduct a public information campaign, which includes media releases, oral presentations and an introductory letter of introduction to all taxpayers.

All information and releases must have prior approval of the RESPECTIVE ASSESSOR.

With the participation and approval of the RESPECTIVE ASSESSOR, individual presentations shall be directed to taxpayers, local officials, business and civic groups so that they may better understand the scope and objectives of the PROJECT. This campaign shall continue on a regular basis for the duration of the PROJECT. At a minimum, the following points shall be addressed:

- Significance of the property tax
- Necessity of PROJECT
- Purpose and methods of PROJECT
- Equity
- Role of TOWN
- Role of CONTRACTOR
- Role of ASSESSOR
- Necessity of data collectors
- Caliber and training of data collectors
- Need for data quality control
- Cooperation of the parcel owners is the key to success

The cost for any news releases shall be the responsibility of the COMPANY. The RESPECTIVE ASSESSOR shall approve the format and content of such releases.

The public relations program must remain flexible to provide sufficient information to promote public understanding. The effectiveness of the public relations program shall depend on flexibility, since the success of the program can only be measured by interaction with and response from the public, which is being addressed.

The program must include but is not limited to:

At the commencement of the PROJECT:

- Press releases
- Meetings with local officials as requested and approved by RESPECTIVE ASSESSOR
- Public meetings on the following topics:
 - The laws concerning revaluation
 - Market value
 - A general outline of revaluation PROJECT
 - Data collection
 - Valuation procedures
 - Review procedures
 - Informal hearings
 - Taxpayer grievance proceedings
 - A pre-data collection leaflet/notice to property owners

During the PROJECT:

- Press releases
- Meetings with local officials as requested and approved by RESPECTIVE ASSESSOR
- Meeting with civic groups as requested and approved by RESPECTIVE ASSESSOR
- Public meetings as requested and approved by RESPECTIVE ASSESSOR
- Staff training meetings
- Data Mailers to property owners

At the conclusion of the PROJECT:

- Press releases
- Meetings with local officials as requested and approved by RESPECTIVE ASSESSOR
- Public meetings as requested and approved by RESPECTIVE ASSESSOR
- Informal hearings
- Board of Assessment Appeals meetings

The CONTRACTOR shall place the assessment data onto a website approved by the RESPECTIVE ASSESSOR from the date that the revaluation notices are mailed until December 31, 2021 for the Town of EAST LYME and December 31, 2022 for the Town of WATERFORD.

E. RECORDS

01. GENERAL PROVISIONS

The CONTRACTOR shall provide all record cards, street cards, owner cards, supplies, equipment, forms, literature, notices and papers to be used in this project at no additional cost to the JOINT TOWNS. All forms shall be subject to approval by the RESPECTIVE 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.

At the completion of the project, CONTRACTOR shall provide the JOINT TOWNS with a reasonable additional supply, not to exceed 10% of parcel count, of the necessary forms used to support CONTRACTOR'S computer assisted mass appraisal program.

02. CAMA

The CONTRACTOR shall be responsible for all necessary data entry and data editing to the existing CAMA system in each RESPECTIVE TOWN as described in PROPOSAL.

Upon completion of the PROJECT, the CAMA shall contain all matter of data, including, but not limited to, updated land rates, cost schedules, and depreciation tables.

Any costs related to the software, software support, licensing, file updating, conversion or conversions are the sole responsibility of the CONTRACTOR during the contract periods ending to coincide with the dates for the completion of the PROJECT. However, if there is a change in those dates, this section shall be automatically amended to coincide with those dates.

03. RECORDS ARE TOWN PROPERTY

The original or a copy of all records and computations, including machine readable databases, made by CONTRACTOR in connection with any appraisal of property in the JOINT TOWNS shall, at all times, be the property of the RESPECTIVE TOWN and, upon completion of the project or termination of this contract by the RESPECTIVE TOWN, shall be left in good order in the custody of the RESPECTIVE ASSESSOR.

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 available by the CONTRACTOR for public inspection in the RESPECTIVE Assessor's office and shall be available thereafter, all in accordance with Section 12-62 (c) of the Connecticut General Statutes.

Such records and computations shall include, but not be limited to:

- Assessor's Maps
- Land Value Maps
- Materials and Wages
- Cost Investigations and Schedules
- Data Collection Forms
- Listing Cards
- Property Record Cards with property valuations and sketches
- Capitalization Rate Data
- Sales Data
- Depreciation Tables
- Computations of land and/or building values
- All letters or memoranda to individuals or groups explaining methods used for appraisals
- Operating statement of income properties
- Duplicated notice of valuation changes
- Database of all property records, CAMA system, and integration with administrative system

04. ASSESSOR'S RECORDS

The CONTRACTOR shall use a system approved by the RESPECTIVE ASSESSOR to accurately account for all records and maps, which may be taken from the files of the RESPECTIVE ASSESSOR in connection with this PROJECT. All such records and maps shall be returned immediately.

None of the RESPECTIVE ASSESSOR'S records shall be taken outside the corporate limits of the RESPECTIVE TOWN without prior written permission of the RESPECTIVE ASSESSOR.

The existing database in the RESPECTIVE ASSESSOR'S CAMA system shall be provided to the CONTRACTOR at the CONTRACTOR'S expense.

05. PROPERTY RECORD CARDS/STREET CARDS

The CONTRACTOR shall complete and file by street order in EAST LYME and file by street order in WATERFORD, Property Record Cards, commonly referred to as "Street Cards" or "Field Cards". These cards shall be printed on paper stock. These cards shall contain all manner of information affecting value, including but not limited to, information as to location of property, classification as to usage, owner of 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 of value applicable to each, public utilities available, public utilities available, underground oil tanks, public improvements, census tract number, 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 70% assessment value will be shown. A computer-generated sketch of all buildings, with the appropriate scale of such sketch, shall also be shown on these cards as well as a photo image of each major structure. (if imaging option is employed by the Town of WATERFORD)

06. ASSESSMENT NOTICES

No later than November 22, 2021 EAST LYME

No later than November 23, 2022 WATERFORD

a notice, subject to prior approval by the RESPECTIVE ASSESSOR, shall be sent, at CONTRACTOR'S expense by first class mail, to each property owner of record, setting forth the fair market value that has been placed upon the property identified in the notice, prepared in duplicate and in conformity with the Connecticut General Statutes Section 12-62(f). 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 hearings 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 notices shall be subject to approval by the RESPECTIVE ASSESSOR and in accordance with Connecticut General Statutes.

The CONTRACTOR shall, at its own expense, send out an additional notice for real property classified under P.A. 490 (farm, forest, open space).

At the time assessment notices are mailed the CONTRACTOR shall provide two (2) bound reports of every assessment, one report to be sorted by name and the other report to be sorted by property location. Additional sets of these reports shall be made available at selected public buildings.

07. DATA MAILERS

To ensure public confidence, taxpayers must play an important role in monitoring the quality of data collection. The CONTRACTOR, at its expense, must send data mailers to all owners of each improved parcel of property. The format of these mailers and the schedule of mailings are subject to the approval of the RESPECTIVE ASSESSOR. The data mailers shall list all fields that affect value, a stamped return-addressed envelope and a cover letter, which explains the purpose and content of the mailer. The format and content of the data mailer, as well as the cover letter, shall be subject to approval by the RESPECTIVE ASSESSOR.

The data mailer shall contain directions on how to correct inaccurate information. The CONTRACTOR shall be responsible for making any corrections to the existing CAMA database as a result of the returned data mailers and the CONTRACTOR shall field inspect such properties as the RESPECTIVE ASSESSOR requires prior to making the corrections shown on the returned data mailers. CONTRACTOR shall field inspect all properties where no completed data mailer has been returned and all properties where data mailers have been returned with corrections.

Before any data mailer is mailed, the CONTRACTOR shall have a comprehensive quality control program, approved by the RESPECTIVE ASSESSOR, in place.

All data mailers shall be mailed no later than January 4, 2021 EAST LYME
All data mailers shall be mailed no later than January 3, 2022 WATERFORD

All data mailers shall have a return date of no later than March 1, 2021 EAST LYME
All data mailers shall have a return date of no later than March 1, 2022 WATERFORD

All inspections necessitated by the data mailers shall be completed by June 1, 2021 EAST LYME.
All inspections necessitated by the data mailers shall be completed by June 1, 2022 WATERFORD.

The mailers for parcels in the residential category shall include, but not be limited to, the following:

- Property type classifications
- Exterior wall material
- Total number of bedrooms
- Number of baths
- Heating Systems
- Fuel types
- Flooring Types
- Last remodel date kitchen
- Last remodel date bath
- # of kitchens
- Basement type - sf of finished/unfinished
- Deck type and square footage
- Year built
- Number of fireplaces and type
- Garage type – detached w/ finished area attached or built in
- Outbuildings - #, size and type
- Central air conditioning
- Owner Comments

F. INFORMAL PUBLIC HEARINGS

Beginning no later than December 1, 2021 EAST LYME
Beginning no later than December 1, 2022 WATERFORD

the CONTRACTOR shall hold informal hearings, at such times and at such locations as the RESPECTIVE ASSESSOR may specify, so that owners of property or legal representatives of owners, may appear at appointed times to discuss with qualified members of the COMPANY'S staff, the assessed valuations of their property. The COMPANY'S personnel shall explain the manner and methods of arriving at value. Informal hearings, at the discretion of the RESPECTIVE ASSESSOR, may be held on weeknights and Saturdays as well as during business hours.

Once the notices are mailed, the CONTRACTOR shall provide sufficient full time personnel for the sole purpose of making appointments for the informal hearings. The CONTRACTOR shall maintain a (national) toll free line for the purpose of making appointments for the informal hearing.

The CONTRACTOR, in conjunction with recommendations of the RESPECTIVE ASSESSOR, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Connecticut and approved by the RESPECTIVE ASSESSOR to handle said hearings expeditiously and fairly.

"Qualified personnel" shall be defined as one who actually performed appraisal work for the PROJECT either as a Reviewer, Supervisor or any such person involved in the actual estimating of value for the PROJECT or such person as approved by the RESPECTIVE ASSESSOR.

Commercial, industrial, and public utility hearings shall be scheduled separately from residential hearings.

The CONTRACTOR shall require each person(s) or his or her legal representative who appears at a hearing, to sign a form indicating whether the CONTRACTOR shall re-inspect the property/properties being discussed, such decision to re-inspect to be at the reasonable discretion of the RESPECTIVE ASSESSOR. This form shall be approved by the RESPECTIVE ASSESSOR and provided by the CONTRACTOR. The completed and signed forms shall be turned over to the RESPECTIVE ASSESSOR at the conclusion of the hearings.

If the property (land and/or building) has not had an interior inspection during the 2021 revaluation (EAST LYME) and 2022 revaluation (WATERFORD), the CONTRACTOR shall conduct an interior inspection prior to any reduction in value being made.

Any such re-inspection shall be made as soon as possible but in no event later than December 31, 2021 in EAST LYME and

Any such re-inspection shall be made as soon as possible but in no event later than December 31, 2022 in WATERFORD

All decisions governing the format, method of public hearing, hearing date and times, time increments of appointments, number of personnel or specialists for the hearings, and the forms for said hearings, are subject to the approval of the RESPECTIVE ASSESSOR.

All costs related to the hearings shall be the responsibility of the CONTRACTOR.

Any information offered by the taxpayer shall be given consideration, and adjustments shall be made where warranted.

The informal hearings shall be completed by December 22, 2021 EAST LYME

The informal hearings shall be completed by December 23, 2022 WATERFORD

The CONTRACTOR shall provide the RESPECTIVE ASSESSOR with a weekly analysis of, but not limited to:

- Number of informal hearings

- Number of accounts resolved in session.

- Number of accounts requiring "in-field" follow-ups.

- Itemized listing of accounts requiring increase/decrease and reason for change.

No later than January 7, 2022 (EAST LYME)

No later than January 7, 2023 (WATERFORD)

The CONTRACTOR shall, at its expense, send by first class mail, to those property owners that appeared at an informal hearing, the result of the hearing. Such notice shall include the original valuation determined by the CONTRACTOR and any adjusted valuation, as deemed appropriate based on any information received at such hearing, or a statement that no change was warranted. Such notice shall be subject to the approval by the RESPECTIVE ASSESSOR and will be mailed no later than,

January 7, 2022 EAST LYME

January 7, 2023 WATERFORD

G. BOARD OF ASSESSMENT APPEALS

The CONTRACTOR shall have qualified personnel (See Section F, above, for the definition of "qualified personnel") available for attendance at any deliberations of the Board of Assessment Appeals held after the completion of this PROJECT, Sundays excluded. Such availability and attendance shall not be required after the date for the completion of the duties of the Board of Assessment Appeals on the October 1, 2021 Grand List, (EAST LYME) and October 1, 2022 Grand List (WATERFORD) to assist in the settlement of complaints and to explain the valuations made.

H. INFORMATION TO THE ASSESSOR

The CONTRACTOR shall give to the RESPECTIVE ASSESSOR any and all information requested pertaining to the revaluation work, for a period of one year after completion of the duties of the Board of

Assessment Appeals on the October 1, 2021 Grand List, (EAST LYME) and October 1, 2022 Grand List, (WATERFORD) without further cost to the TOWN.

Throughout the PROJECT, the CONTRACTOR shall satisfy all requests made by the JOINT TOWNS 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 biweekly progress reports are required throughout the duration of the PROJECT, commencing thirty (30) days from the date the work commences.

I. APPRAISAL SPECIFICATIONS

01. Land

The CONTRACTOR shall appraise all land excepting the Millstone Point Nuclear Power Station in WATERFORD within the JOINT TOWNS: including residential, commercial, industrial, agricultural, special use, public utility, whether taxable or tax exempt, vacant or improved.

a. Land Study

Land shall be valued on the basis of an analysis of all sales data occurring between

October 1, 2019 (inclusive) and October 1, 2021 (inclusive), in EAST LYME

October 1, 2019 (inclusive) and October 1, 2022 (inclusive), in WATERFORD

The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the RESPECTIVE ASSESSOR. The CONTRACTOR shall make a careful investigation of this data and shall consult owners, realtors, banks and other sources for information relative to sales of properties within the RESPECTIVE TOWN. All factors affecting the final values of land shall be considered, such as location, zoning, inland wetlands, topography, soil condition, 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.

b. Land Inspection

The CONTRACTOR shall make necessary adjustments in value to compensate for topographical irregularities such as high banks, steep slopes, swamps, irregular shapes or anything else, which may detract from or enhance the value of the land.

Non-conforming uses and zoning variances shall be considered in establishing values.

All such adjustments shall only be made if they are market supported.

c. Land Unit

The CONTRACTOR shall prepare land unit values in a format necessary for Vision Appraisal Government Solutions Inc. CAMA system in EAST LYME and for the Town of WATERFORD by front foot, square foot, acreage or fractional acreage; whichever in the judgment of the RESPECTIVE ASSESSOR most accurately reflects the market for the appraised land.

The CONTRACTOR for the valuing of land shall develop all necessary tables and charts. These tables and charts shall be prepared according to standard appraisal practices and shall be subject to the approval of the RESPECTIVE ASSESSOR.

d. Land Value Map

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

e. Neighborhood Delineation

After consideration of the environmental, economic and social characteristics of the RESPECTIVE TOWN, the CONTRACTOR shall, with the cooperation and approval of the RESPECTIVE ASSESSOR, delineate "neighborhood" units within the TOWN. Each neighborhood unit shall exhibit homogenous characteristics. Each neighborhood unit shall be assigned a separate identification code. These neighborhood codes shall be recorded and maintained on all property record cards and the computer database in the Vision Appraisal Software system for the Town of EAST LYME and in the Town of WATERFORD respectively.

f. PA490/Open Space

The RESPECTIVE ASSESSOR shall provide use values for all land classified as farm, forest or open space pursuant to 12-96, 12-107c, 12-107d and 12-107e (CGS). The CONTRACTOR shall provide the fair market value for such classified properties. The CONTRACTOR shall aid the RESPECTIVE ASSESSOR in the process of applying these assessments to all such designated parcels. The CAMA system shall be capable of generating and maintaining both market values and P.A. 490 values.

02. RESIDENTIAL BUILDINGS AND STRUCTURES

a. Physical Details

The CONTRACTOR shall make a careful and complete listing of physical construction details of all residential buildings and structures and all structural improvements appurtenant to residential property in the JOINT TOWNS on proper forms as previously covered in these CONTRACT SPECIFICATIONS.

b. Sketches

The RESPECTIVE ASSESSOR will allow the CONTRACTOR to use previous sketches. Care must be given to ensure that the previous sketch is accurate to the present and, if not, a new sketch will be drawn. Sketches will be drawn to the nearest foot and labeled using the labeling procedures approved by the RESPECTIVE ASSESSOR. If no sketch presently exists, a sketch will be prepared.

c. Physical Inspections

All physical improvements shall be inspected, measured and listed for those properties that
a) sold between October 1, 2019 (inclusive) and October 1, 2021 (inclusive), in EAST LYME
sold between October 1, 2019 (inclusive) and October 1, 2022 (inclusive), in WATERFORD
b) have less than 100% construction on the ASSESSOR'S street cards as of October 1, 2020 in East Lyme and as of October 1, 2021 in Waterford.
c) have open building permits d) have not returned a data mailer e) have returned a data mailer that indicates a change f) certain parcels as determined by the Assessor

The CONTRACTOR shall make a listing of physical construction details of all the structural improvements pertinent to residential property in the RESPECTIVE TOWN, on data collection cards (listing cards) for entry into the CAMA database. Details of all structural improvements also are to be listed on the property record cards (field cards). For property data quality assurance, a data collection manual, training for data collectors, and data entry edit procedures must be provided.

The CONTRACTOR will verify or correct the complete listing of all physical details for all residential, commercial and industrial buildings and all structural improvements attached to each parcel. Listing will include all interior and exterior construction details, quality of construction, age and condition.

d. Exterior Inspections

The perimeter of all improvements shall be carefully and accurately measured. All buildings and improvements shall be measured to the nearest foot. When measuring, all buildings and improvements shall be measured to the nearest foot. Six (6) inches or less shall be rounded down; seven (7) inches or more shall be rounded up. An outline sketch shall be prepared to scale. Physical data of the parcel shall be recorded on the data collection form at the site to include topography, street improvements, ponds, power lines, obvious wetlands and other physical characteristics. CONTRACTOR shall update all physical data including outline sketch, on the CAMA system.

e. Review

Properties shall be field inspected, as the RESPECTIVE ASSESSOR shall require. 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 they are correlated to comparable properties. The ASSESSOR shall be notified of the dates of review and be entitled to accompany the reviewers during this phase of the revaluation. If it is evident that the existing outline sketch, or any part thereof it is inaccurate for any reason, the area in question shall be marked and returned to the RESPECTIVE ASSESSOR for verification.

f. Interior Inspections

The CONTRACTOR shall make every attempt to make a careful inspection of the complete interior of at least forty (40%) of improved properties where no questionnaire has been received or where a questionnaire with changes has been received and The CONTRACTOR shall also make every attempt to make a complete interior inspection of any property with an outstanding building permit, or with construction less than 100% complete as of October 1st preceding each respective town's revaluation date, that have sold between October 1,2019 and October 1,2021 for East Lyme and October 1, 2020 and October 1, 2022 for Waterford, excluding those wherein the owner refuses permission to inspect. The Assessor shall determine the parcels to be inspected if the above categories yield less than 40% until the 40% threshold of properties is reached. See Call Backs Section 0.3 below.

The CONTRACTOR shall verify all sales with the owner and code them as useable or non-useable transactions. Useable transactions are defined as "arms-length" sales and do not include foreclosures, family sales, auction sales, estate sales, etc.

Interior inspections shall be complete. Information taken at the door is unacceptable. It shall be noted on the record card if the data collector is not allowed to view any portion of the property, and the reason why.

The CONTRACTOR shall make every effort to complete interior inspections of at least 40% of non-received or changed questionnaire properties and/or of those properties with outstanding building permits or with construction less than 100% complete and those properties that have sold during the previously stated time period. It is of the utmost importance to meet this 40% requirement and be in compliance with performance based testing standard CGS 12-62i.

The Towns reserve the right to amend the inspection requirement in the REVALUATION Contract in the event that an Executive Order is issued due to a public health and safety emergency.

01. Verification

The Lister shall have each interior inspection verified, including the date of the inspection, by having an adult owner or resident of each building or dwelling unit sign the data collection card (listing card).

At no time shall any employee of the CONTRACTOR enter any structure that is occupied solely by a minor. A minor is defined as any individual less than 18 years of age.

02. Entrance Refusal

When entrance to a building for an inspection is refused, the Lister shall make note of the fact and within two (2) working days notify the RESPECTIVE 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 RESPECTIVE ASSESSOR shall review each such case, and the RESPECTIVE ASSESSOR shall send a letter to the owner of the property to explain the importance of a complete interior and exterior inspection of the property. If the RESPECTIVE ASSESSOR shall be unable to gain the cooperation for a complete inspection, the RESPECTIVE ASSESSOR shall so notify the CONTRACTOR, and they shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and on the basis of an estimate of the interior features and interior condition of the property. The CONTRACTOR shall make adequate notations of the lack of cooperation, and the manner of arriving at value, conspicuously on the property record card (field card).

In an instance whereby access has not been made or permitted, and a question exists regarding building size, number of rooms, bathrooms or other pertinent data, the CONTRACTOR shall first check with the Building Officials.

If the ASSESSOR is not notified, as required above, that entrance was denied at a property, the property shall be counted as "not inspected" NOT as "refused".

03. Call Backs

Where necessary the CONTRACTOR shall make two (2) call backs, one of which must be on a weekday between 5:00 PM and 8:00 PM, or on a Saturday. Time and date of call back shall be noted on the data collection card (listing card) and on the property record card (field card) by the Lister making the call back.

04. Notification Letter

If after two (2) call backs, contact was not established with a property owner, a notification letter (approved by the RESPECTIVE ASSESSOR) shall be mailed at the CONTRACTOR'S expense, notifying the property owner that the representatives of the CONTRACTOR were not able to make contact, and request that within a prescribed time limit the property owner contact the CONTRACTOR, by telephone or by mail, for alternative arrangement for the inspection of the property. The CONTRACTOR shall investigate all returned mail for current and/or corrected addresses, and re-mail such notices.

If the property owner does not arrange for and keep an appointment for interior and exterior inspection of the property by the CONTRACTOR within the prescribed time limit, it shall be considered a refusal. The RESPECTIVE ASSESSOR shall be notified. If the RESPECTIVE ASSESSOR is not so notified, the property shall be counted as "not inspected" NOT as "refused".

The CONTRACTOR shall at no time during the PROJECT refuse to inspect any property when the property owner has made a request.

05. Lister Identified

The data collection card (listing card), the property record card (field card) and CAMA system shall indicate the initials of the lister and date(s) of the listing.

06. Status Reports

The CONTRACTOR must provide the RESPECTIVE ASSESSOR with monthly status reports as to the percentage of interior inspections with signatures that have been obtained in relationship to the total number of properties that have been inspected.

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

a. General

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

b. Description

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

c. Income Approach

Income and expense data gathered by the JOINT TOWNS shall be utilized by CONTRACTOR for income producing and where appropriate, owner-occupied properties. Any income and expense data including OPM form, M58 with accompanying summary reports and rent schedules shall become property of the JOINT TOWNS.

All information filed and furnished with Income and Expense report including OPM form, M58 shall not be a public record and is not subject to the provisions of Section 1-200 (Freedom of Information) 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 and income data. Rates shall be established for the various classes of property and checked by bankers, investors and appraisers to ensure their accuracy. When the RESPECTIVE ASSESSOR has approved the rates and methods, 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.

The TOWN shall be responsible for the collection of the M-58 (Income and Expense) Reports

d. Yard and/or Site Improvements

All yard improvements shall be listed and valued separately.

e. Fixed Equipment

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

Any item which might be considered an item of personal property yet is included in the valuation of the building, the RESPECTIVE ASSESSOR shall be notified in writing and it shall be separately listed and described by the CONTRACTOR either on the property record card or separately on another record.

f. 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 familiar with the revaluation PROJECT, trained and fully experience in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building; for the final value of which he or she is responsible. During the review phase when any changes are made due to data error, the data must be corrected on the property record card (field card) and in the CAMA system by the CONTRACTOR.

J. SCHEDULES

01. Building Cost Schedules, General

The CONTRACTOR shall prepare for usage in the PROJECT including usage in the CAMA system Vision Government Solutions Inc. for the Town of EAST LYME and for the Town of WATERFORD, 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 buildings as applicable. These schedules shall be used in computing the replacement cost in the RESPECTIVE TOWN for all residential, commercial, industrial, and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees and all other direct and indirect costs of construction. Before final acceptance they will be proven by testing against known sales. The RESPECTIVE ASSESSOR will approve all finalized schedules before adoption and usage by CONTRACTOR.

The cost schedules must be supported by a recognized valuation publication company.

02. Types of Cost Schedules

a. Residential

Residential cost schedules shall include schedules for various classifications, types, models, and story heights on a cost 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 or detached, basement garages, and finished basements and schedules for other building improvements usually found on residential property including, but not limited to, in-ground swimming pools, barns, sheds, tennis courts, gazebos, hot tubs, solar panels, geothermal systems and wind turbines.

b. Commercial

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

c. Industrial and Special Purpose

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 the additions and deductions for construction components from base specifications.

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.

01. 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 buildings and special use buildings and shall be approved by the RESPECTIVE ASSESSOR.

The CONTRACTOR shall develop and explain separately, each, depreciation on the property record card and/or worksheet if used.

04. Schedules for TOWN

The CONTRACTOR shall supply and leave for the RESPECTIVE TOWN not less than three (3) copies of all the above-required building cost schedules and depreciation schedules. Appraisal schedules are all tables, factors, models and model descriptions, which were employed in the PROJECT to process value estimates as required in the section of this CONTRACT entitled "Appraisal Specifications". A draft copy of these appraisal schedules shall be turned over to the RESPECTIVE ASSESSOR upon approval of the schedules by the RESPECTIVE ASSESSOR. These schedules shall be in the form of a bound manual and shall be the same schedules used in the CAMA system.

B. SALES ANALYSIS

Sales analyses of all properties, sold between October 1, 2019 (inclusive) and October 1, 2021 (inclusive), in EAST LYME and October 1, 2020 (inclusive) and October 1, 2022 (inclusive), in WATERFORD shall be performed as a means of sustaining the values derived. These analyses shall be done on the aggregate of all residential, commercial, industrial, public utility, vacant land and special purpose properties.

The sales analyses shall include, at a minimum, sales ratios and coefficients of variance and dispersion. All sales that are part of the sales analyses shall be verified. A sales-assessment analysis with these same factors and measures shall also be done for all sales in a class and in each residential neighborhood.

All sales that are a part of the sales analyses shall be verified. The CONTRACTOR shall provide effective screening, confirmation of sales prices and inspection of sale property.

Any additional requests for sales analyses by the RESPECTIVE ASSESSOR shall also be performed.

L. QUALITY CONTROL

01. General

The CONTRACTOR shall be required to submit a detailed quality control program. The quality control must address both the accuracy and validity of the data. This program should include some form of data recollection to assure the quality of the data being collected. This program must include a comprehensive reporting system and be approved by the RESPECTIVE ASSESSOR. This program shall include questionnaires mailed to property owners at the CONTRACTOR'S expense.

02. PERFORMANCE BASED REVALUATION STANDARDS

It is understood and agreed that the reappraisal of properties covered by this CONTACT shall meet or exceed the standards as outlined in the Performance Based Revaluation Standards and Certification of Revaluation (Section 12-62(i) as amended from time to time) and shall conform to the procedures and technical requirements of the RESPECTIVE ASSESSOR.

To that end, preliminary Performance Based Revaluation reports shall be completed, as requested by the RESPECTIVE ASSESSOR, prior to the printing and mailing of the assessment notices.

The CONTRACTOR shall be required to provide such Management Plan as require by Section 12-62(i) as amended from time to time.

M. INCOMPLETE CONSTRUCTION

The CONTRACTOR shall code as “unfinished construction” all property cards which have incomplete improvements on the October 1, 2021 Grand List. in EAST LYME and October 1, 2022 Grand List in WATERFORD.

The street card shall show the percentage of completion, based upon a schedule approved by the RESPECTIVE ASSESSOR, and reflect the percentage of completion in the valuation.

At the conclusion of this PROJECT, the CONTRACTOR shall deliver to the RESPECTIVE ASSESSOR a listing by property location for all property cards that have incomplete improvements as of October 1, 2021 in EAST LYME and October 1, 2022 in WATERFORD.

N. FIELD REVIEW

All properties shall be reviewed **in the field** by the CONTRACTOR’S personnel certified as reviewers. The reviewer shall be completely trained and fully experienced in the appraisal of the particular type and kind of residential, commercial, industrial, public utility or special purpose property that he/she is responsible. The RESPECTIVE ASSESSOR shall be notified of the dates of review and shall be entitled to accompany the reviewers. A field review shall be completed pursuant to: PA 06-148

O. PRICING AND VALUATIONS

Using CAMA systems as previously identified in this document and the mass appraisal procedures developed by the CONTRACTOR in concert with the Connecticut General Statutes, the CONTRACTOR shall calculate a value estimate for each parcel that shall be comprised of 1) land value, 2) building value, 3) other improvement value(s) and 4) total value.

The final valuation of any property shall be the fair market value of the land, buildings and other improvements, as they existed on October 1, 2021 in EAST LYME and October 1, 2022 in WATERFORD. Fair market values shall be rounded to the nearest hundred.

Prior to the mailing of the assessment notices, the CONTRACTOR’S Project Manager or Supervisor shall review the final values, as computed by the CONTRACTOR, with the RESPECTIVE ASSESSOR, to ensure that the RESPECTIVE TOWN is prepared to accept the COMPANY’S work.

The RESPECTIVE ASSESSOR shall make the final judgment on the final values. If deemed to be unacceptable, the values shall be corrected or revised by the COMPANY as required or specified by the RESPECTIVE ASSESSOR.

P. TRAINING

The CONTRACTOR shall be responsible for training the RESPECTIVE ASSESSOR’S staff in such manner that, at the end of the project, the RESPECTIVE ASSESSOR’S Office shall be knowledgeable in the operation of all phases of the valuation system. If more than one (1) person is receiving training at the same time, the training time shall be calculated as if one (1) person is receiving training.

All Training shall take place on the RESPECTIVE TOWN’S computer hardware within the RESPECTIVE TOWN unless both the RESPECTIVE TOWN and CONTRACTOR agree to an alternate training site.

On-the-job training, where feasible, shall consist of the RESPECTIVE ASSESSOR and his or her staff working in the appropriate phases of this PROJECT under the CONTRACTOR’S supervision.

The CONTRACTOR shall provide a detailed user manual for the CAMA software and Grand List production.

The CONTRACTOR shall submit a reasonable training plan and schedule to achieve the objective stated above prior to the commencement of the PROJECT.

Q. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR

Regular periodic delivery of appraisals and other information required under this CONTRACT and CONTRACT SPECIFICATION, as completed and in accordance to a schedule hereinabove set forth or agreeable to the RESPECTIVE ASSESSOR shall be made to the RESPECTIVE ASSESSOR for his or her review.

All appraisals of buildings (either complete or under construction) shall be completed as of October 1, 2021 for EAST LYME and October 1, 2022 for WATERFORD.

All completed and/or corrected records shall be turned over to the RESPECTIVE ASSESSOR as of January 7, 2022 for EAST LYME and January 7, 2023 for WATERFORD.

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, 2021 for EAST LYME and October 1, 2022 for WATERFORD.

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

It is understood and agreed that the reappraisal of properties covered by this contact shall meet or exceed the standards as outlined in the Connecticut Performance Based Revaluation Standards and Certification of Revaluation (Connecticut General Statutes sec. 12-62I-1 to 12-62I-7 and as amended time from time), shall conform to the procedures and technical requirements of the RESPECTIVE ASSESSOR and, at least biweekly, the CONTRACTOR shall meet with said RESPECTIVE ASSESSOR to discuss the progress and various other details of the project.

R. LITIGATION

In the event of appeal to the courts, either pursuant to Section 12-117a or Section 12-119 of the Connecticut General Statutes (as amended from time to time), the COMPANY shall furnish a competent witness or witnesses (approved by the RESPECTIVE ASSESSOR) with first-hand knowledge of the PROJECT, to defend the valuation of the properties appraised, it being understood that the CONTRACTOR shall furnish said witness or witnesses on any court action instituted on the October 1, 2021 Grand List (EAST LYME) and October 1, 2022 (WATERFORD) assessments and successive Grand Lists, until final adjudication by the courts. The COMPANY shall not be held responsible for any assessments changed from the original valuation figure by parties other than the COMPANY, unless the figure determined by the COMPANY, was unreasonable, unsupportable or erroneous in the view of the RESPECTIVE ASSESSOR.

It is understood that the CONTRACT price shall include the cost of two (2) person days for court defense and/or preparation for each respective Town.

It is further understood that the COMPANY will bill for any services requested by the RESPECTIVE ASSESSOR for court defense and/or preparation in excess of two (2) person days at a rate per person of no greater than \$700.00 (seven hundred dollars) per day. A single person day shall be defined as seven (7) hours.

The CONTRACTOR shall cooperate with the JOINT TOWNS by providing assistance, any necessary documentation or narrative appraisal reports, to fully explain or defend valuations. The CONTRACTOR shall maintain accurate records of preparation time. That preparation time shall be subject to the reasonable control of the JOINT TOWNS. If an action arises to revoke the REVALUATION of the October 1, 2021 Grand List in EAST LYME and or the October 1, 2022 Grand List in WATERFORD, the CONTRACTOR shall provide competent witnesses to defend the REVALUATION at no cost to the JOINT TOWNS.

03. RESPONSIBILITIES OF THE TOWN

A. Nature of Service

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

The CONTRACTOR shall, in good faith, use its best efforts to assist the RESPECTIVE ASSESSOR in determining accurate and proper valuations and shall not undervalue or overvalue any land, building or other property to avoid or to minimize its responsibilities as outlined in these CONTRACT SPECIFICATIONS.

The RESPECTIVE ASSESSOR shall designate the CONTRACTOR to view by physical inspection all real property, which a) sold between October 1, 2019 (inclusive) and October 1, 2021 (inclusive), in EAST LYME and sold between October 1, 2019 (inclusive) October 1, 2022 (inclusive), in WATERFORD, b) have less than 100% construction (as of October 1, 2020 in EAST LYME and as of October 1, 2021 in WATERFORD) on the RESPECTIVE ASSESSOR'S field cards, c) have open building permits, or d) certain other properties as selected by the RESPECTIVE ASSESSOR, in the RESPECTIVE TOWN in compliance with Connecticut General Statutes

B. Cooperation

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

C. Items Furnished By The Town

The JOINT TOWNS shall furnish the following:

01. Maps

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

02. Land Dimensions

The JOINT TOWNS 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 measurements or acreage.

03. Zoning

The JOINT TOWNS will provide current RESPECTIVE TOWN zoning regulations and a zoning map.

04. Existing Property Record Cards

The RESPECTIVE TOWN shall make available to the CONTRACTOR, at their expense, the current CAMA database for all property accounts.

05. Property Transfers

The RESPECTIVE TOWN shall notify the CONTRACTOR, on a regular basis, of property splits and transfers occurring after the initial creation of the revaluation database for the CONTRACTOR.

The CONTRACTOR shall update the revaluation database as necessary.

06. Building Permits

The RESPECTIVE ASSESSOR shall screen and make available on a timely basis to the CONTRACTOR, copies of all building permits issued during the course of this PROJECT (up to and including October 1, 2021 for EAST LYME and October 1, 2022 in WATERFORD) to allow the inclusion of all new construction, additions, remodeling or demolitions in the CONTRACTOR’S appraisals.

All building permit copies shall be returned to the RESPECTIVE ASSESSOR at the completion of this PROJECT.

07. Signing of Communications

The JOINT TOWNS shall sign, by the RESPECTIVE ASSESSOR, communications to be mailed at CONTRACTOR’S expense, for the purpose of contacting a property owner for inspection of the property or for such other purpose as is deemed appropriate by the RESPECTIVE ASSESSOR.

08. Mailing Addresses

The JOINT TOWNS shall make available through the RESPECTIVE ASSESSOR’S Office the current mailing address and other relative data that exists on the administrative program for all property owners.

09. Office Space

The Towns of EAST LYME and Waterford shall furnish to the CONTRACTOR sufficient office space in their Town Halls to carry out the terms of this CONTRACT. Data entry shall be done at the Town Hall and available to the assessor for quality control purposes for the REVALUATION.

The JOINT TOWNS shall also provide space, at no charge to the CONTRACTOR, for the purpose of holding the Informal Public Hearings.

10. Obligation to Keep Current

The JOINT TOWNS shall continuously and currently update the information specified above.

11. Sales Information

The JOINT TOWNS shall continuously and currently provide copies of all sales information available to it with respect to transfer of parcels.

12. INCOME AND EXPENSE FORMS (M-58)

The Town of EAST LYME shall be responsible for the collection of the M-58 (Income and Expense) Reports:

INCOME PERIOD	M-58 TO BE MAILED BY	M-58 TO BE RETURNED BY
January 1,2019 to December 31, 2019	July 1 2020	August 15, 2020
January 1, 2020 to December 31, 2020	April 1, 2021	June 1, 2021

The Town of WATERFORD shall be responsible for the collection of the M-58 (Income and Expense) Reports:

INCOME PERIOD	M-58 TO BE MAILED BY	M-58 TO BE RETURNED BY
January 1,2020 to December 31, 2020	April 1, 2021	June 1, 2021
January 1, 2021 to December 31, 2021	April 1, 2022	June 1, 2022