



FIRM NAME OF PROPOSER: \_\_\_\_\_

BY: SIGNATURE \_\_\_\_\_

TYPE NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

### **PROPOSAL FORMAT AND CONTENTS**

1. In addition to addressing each of the items in the Specifications, the Contractor must submit, as part of its proposal, the following information:
2. Project Proposal Form.
3. A summary of the Proposal's advantages and strengths.
4. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least sixty (60) Calendar Days from the deadline for the submission of proposals.
5. A list of Connecticut Municipalities for which the Contractor has completed Revaluation Programs.
6. A list of Connecticut Revaluation Contracts for which the Contractor is currently committed.
7. Listing of Connecticut Municipalities, the contractor has previously worked on that required the use of the CAMA system of eQuality Valuation Services LLC.
8. Description of the methodologies used for assessing values for residential, commercial, apartment, industrial, utility and vacant land parcels.
9. Description of sales analyses performed to verify accuracy of valuations.
10. Description of the Contractor's public relations program that would be used during the revaluation.
11. Copy of Contractor's current Connecticut Revaluation Certificate issued pursuant to Connecticut General Statutes 12-2c.
12. Indication of how many years the Contractor has been engaged as a company, corporation, partnership, or individual specializing in municipal revaluation services.
13. Bid Bond or certified check for ten (10) percent of the highest proposal requirement submitted made payable to the CITY OF ANSONIA.

## APPENDIX A

### CONTRACT SPECIFICATIONS

#### DEFINITIONS

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

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

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

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

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

**QDS** – The abbreviation “**QDS**” stands for the firm of Quality Data Service Inc., which provides the current grand list administrative software to the **CITY**. The contact is:

Quality Data Service, Inc.  
121 Mattatuck Heights Road  
Waterbury, Connecticut 06705  
Phone (203) 755-9031  
Fax (203) 574-4360

**EQUALITY** – The word “**EQUALITY**” stands for the firm of Quality Data Service Inc., which provides the CAMA software on which the Revaluation will be performed.

**EAGLEVIEW** – The word “**EAGLEVIEW**” stands for the firm of Eagleview, which provides the CAMA software on which the Revaluation will be performed.

**CITY** – The word “**CITY**” shall mean the City of Ansonia, Connecticut

#### I. SCOPE OF REAPPRAISAL AND REVALUATION

This **PROJECT** includes the complete reappraisal and revaluation of all real property within the corporate limits of the City of Ansonia, Connecticut.

The **CITY** is licensed to utilize the CAMA Software of **EQUALITY** for the Revaluation Project. The **CITY** is not looking to change the existing CAMA software at this time.

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

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

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

**EFFECTIVE DATE**

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

**CITY DATA**

Date of Last Revaluation-----October 1, 2017.  
Estimated Population-----18,654  
Area of the City-\_\_-----6.19 square miles  
Forms of Government----- Mayor-Board of Aldermen  
Total Parcels to base the proposal on ----- 5918

## II. REVALUATION INSPECTION REQUIREMENTS

### Full Revaluation

The CITY of ANSONIA would like to use **EAGLEVIEW** for Images and Sketch Check. Please include an estimate for these services, including 2 years of licensing with the proposal.

Property Type	Total Parcels	Total Buildings	Estimated Inspections	Counts
Residential	5,313	5,218	20%	<b>1060</b>
Condominium	165	165	5%	<b>15</b>
Commercial	440	389	100%	<b>440</b>
<b>Total</b>	<b>5,918</b>	<b>5,772</b>		<b>1,005</b>
Permits(1yr)	500		100%	<b>500</b>
Sales(2yrs)	1,200		10%	<b>125</b>
				<b>1,630</b>

<b>Residential and Condominiums</b>	
Introduction Letter	No
Exterior	
Exterior Flyover outliers only from SketchCheck	Yes
Interior	
Data Mailer only – one mailing	Yes
Return Postage Paid Envelope?	Yes
Interior as requested from mailer. Inspection if discrepancy.	Yes

<b>Commercial</b>	
Introduction Letter	No
Exterior	
Exterior Flyover outliers only from SketchCheck	Yes
Commercial Uses Verified/Updated	Yes
Interior	
Full Interior	Yes

<b>Sales</b>	
Number of years	2
Sales Verification Letter	Yes
Return Postage Paid Envelope?	Yes
Online Listings can be used for data	Yes
Interior and Exterior if needed from sales Verification letters	Yes

<b>Permits</b>	
Number of years	2
Exterior Measure as needed	Yes
Interior as needed	Yes

<b>Field Review</b>	
Eagleview can be used	Yes
Drive by pockets only based on analysis	Yes

### III. GENERAL CONDITIONS

#### A. CONTRACTOR

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

#### B. PERSONNEL

The **CONTRACTOR** shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provision of Federal and State governments. The **CONTRACTOR** shall submit to the **CITY** written qualifications of all personnel assigned to this **PROJECT**. All personnel assigned to this **PROJECT** shall be subject to the approval of the **ASSESSOR** prior to the commencement of the individual's duties with the **CITY** and may be removed for cause from this **PROJECT** by the **CONTRACTOR** upon written notification from the **ASSESSOR**.

### IV. MINIMAL QUALIFICATIONS

#### A. PROJECT MANAGER OR SUPERVISOR

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

#### B. REVIEWERS AND APPRAISERS

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

#### C. IDENTIFICATION

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

#### D. CONFLICT OF INTEREST

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

## V. PROTECTION OF THE CITY

### A. BONDING

To secure faithful performance by the **CONTRACTOR**, of the terms of this agreement, shall furnish to the **CITY** a Performance Surety Bond the amount of this **CONTRACT**, which bond shall be issued by an admitted bonding company licensed to do such business in the State of Connecticut with a minimum A.M. Best Company rating of at least "A-/VIII". Said bond shall be delivered to the **CITY** prior to the commencement of the actual work and shall be in a form satisfactory to the **CITY** Attorney. This bond shall include the appeal requirements of these **SPECIFICATIONS**. It is understood and agreed that upon completion and delivery of the revaluation to the **CITY**, the performance bond shall be reduced to ten (10%) of the value of the contract to cover the defense of all appeals. This reduced bond amount shall become effective until a final resolution in the courts of any timely appeals taken from the doings of the Board of Assessment Appeals on the October 1, 2022 Grand List. The **CITY** reserves the right to waive any insurance requirement if it is in the best interest of the **CITY**.

### B. INSURANCE

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

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

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

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

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

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

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

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

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

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



### C. LIQUIDATED DAMAGES

Liquidated damages shall be deducted from the **CONTRACT** price and will represent a fair and equitable estimate of damages the **CITY** will suffer if the **CONTRACTOR'S** work is not completed by January 31, 2023. The **CITY** shall have the right to use the funds withheld from each periodic payment to the **CONTRACTOR**, to satisfy in whole or in part, this liquidated damages clause. Delays occasioned by war, strike, explosion, acts of God or an order of court or other public authority are accepted.

Failure by the **CONTRACTOR** to complete all work prior to the date specified herein, January 31, 2023, shall be cause for a penalty payment by the **CONTRACTOR** upon request of the **ASSESSOR** in the amount of **TWO HUNDRED FIFTY DOLLARS (\$250.00)** per day beyond the specified date of completion. The **CONTRACTOR** agrees that this is fair value and that it reasonably approximates the cost to the City for any delays beyond the mandatory completion date of January 31, 2023. For the purpose of this penalty only, completion of all work not later than January 31, 2023 is defined as follows:

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

## VI. CHANGES TO THE CONTRACT

### A. CHANGES

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

**C. COMPLETION DATE AND TIME SCHEDULE**

The revaluation work may be started at the convenience of the **CONTRACTOR**, but not later FEBRUARY 1, 2022 or 2 weeks after contract signing and must continue in a diligent manner so as to ensure completion within schedule of completion dates as set forth below: The following phases of revaluation must be completed in accordance with the following schedule:

Key Milestones	Target Date
<b>Start</b>	FEBRUARY 1, 2022
City Access to the Revaluation Data	FEBRUARY 1, 2022
Preliminary Land Study and Neighborhood Delineation	July 1, 2022
Preliminary Numbers and Cost Book	July 1, 2022
Market Rents Study	July 1, 2022
Complete Data Collection and Entry	August 15, 2022
Complete Review	September 2, 2022
Final Collection of Permits and Sales	October 10, 2022
Turn over Values to the Assessor	November 4, 2022
Finalized Assessments	November 11, 2022
Assessment Notices Mailed	November 18, 2022
Informal Hearings Start	December 16, 2022
Informal Hearings End	January 17, 2023
Inspections and Changes Completed	January 21, 2023
Informal Results Mailed	January 22, 2023

**D. PAYMENT SCHEDULE**

1. PERIODIC PAYMENTS

Payments shall be made in the following manner:

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

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

2. STAGES OF COMPLETION

Chart to be Included by **CONTRACTOR**

Phase	%	Amount
Bonding, Project Startup, Project Management, Project Support Data Mailers - Print, Mail and Process Collection and Entry from Sales, Permits, Eagleview and Mailers Field Review – Using Eagleview Valuation Analysis and Review Print and Mail Notices Informal Hearings Completed and Final Adjustments Made BAA and Final Work Products		
<b>Sub Total</b>	<b>100%</b>	
Eagle View + 2-year license		
	<b>Total</b>	

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

## VII. RESPONSIBILITIES OF THE CONTRACTOR

### A. GOOD FAITH

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

### B. PUBLIC RELATIONS

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

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

### C. CONDUCT OF COMPANY EMPLOYEES

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

## D. RECORDS

### 1. GENERAL PROVISIONS

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

### 2. CAMA REQUIREMENTS

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

### 3. DATA INTEGRITY

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

### 4. RECORDS ARE CITY PROPERTY

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

### 5. ASSESSOR'S RECORDS

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

### 6. PROPERTY RECORD CARDS (STREET CARDS)

The **CONTRACTOR** shall complete **Property Record Cards**, commonly referred to as "**Street Cards**" and file in alphabetical street order. These cards shall contain all manner of information affecting value, including but not limited to, information as to location of property, classification as to usage, owner of records, source of title, size, shape and physical characteristics of land, with the breakdown in acreage, along with the unit of value applicable to each public utility, public improvements and zoning regulations in effect as of the assessment date. All physical improvements shall be listed giving all interior and exterior construction details. Quality of construction, age, condition, replacement values, and percent of physical, functional and

economic depreciation, depreciated values, fair market value and assessment value will be shown. The **CONTRACTOR** shall review all comments listed on the field card and add or retain all pertinent information and delete non essential data relative to the property. A computer-generated sketch of **ALL** buildings with the appropriate scale of such sketch along with an accompanying photograph shall also be shown on these cards.

#### **E. ASSESSMENT NOTICES**

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

#### **F. INFORMAL PUBLIC HEARINGS**

At a time, mutually agreeable to the **ASSESSOR** and **CONTRACTOR**, but not later than December 16, 2022, following completion of all review work by the **ASSESSOR** and the **CONTRACTOR**, the **CONTRACTOR** shall hold public hearings so that property owners or their legal representatives may appear at specified times to discuss with qualified members of the **CONTRACTOR'S** staff, the valuations of their property. The **CONTRACTOR'S** personnel shall explain the manner and methods used to arrive at the new value.

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

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

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

#### **G. BOARD OF ASSESSMENT APPEALS**

The **CONTRACTOR** shall have the project supervisor available for two (2) hours of training sessions with the Board of Assessment Appeals prior to the Board's hearings relative to the October 1, 2022, Grand List. After the completion of the duties of the Board of Assessment Appeals, such availability and attendance shall not be required to assist in the settlement of complaints and/or to explain the valuation changes. The **CONTRACTOR** shall enter all changes made by the Board of Assessment Appeals to the valuation file and generate new street cards and summary reports for the **ASSESSOR**.

#### **H. LITIGATION**

In the event of a court appeal the **CONTRACTOR** shall furnish, at its sole cost, a maximum of 5 (five) days, as required by the **ASSESSOR**, a competent witness or witnesses, approved by the **ASSESSOR**, to defend the valuation of the properties appraised. It is understood that the **CONTRACTOR** shall furnish said witness or witnesses on any court action instituted on the October 1, 2022 Grand List assessment. The **CONTRACTOR** shall not be held responsible for any assessment changed from the original valuation figure by parties other than **CONTRACTOR**.

**I. INFORMATION**

1. INFORMATION TO THE CITY

The **CONTRACTOR** shall give to the **ASSESSOR** any and all information requested pertaining to the **PROJECT** for a period of two (2) years after completion of the duties of the Board of Assessment Appeals on the October 1, 2022. Grand List without any additional cost to the **CITY**.

2. WORK SCHEDULE

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

**J. BUILDING COST SCHEDULES**

1. GENERAL

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

2. TYPES OF COST SCHEDULES

a. Residential

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

b. Commercial

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

c. Industrial and Special Structures

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

d. Farm

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

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

### 3. DEPRECIATION SCHEDULES

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

### 4. SCHEDULES FOR THE CITY

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

## VIII. APPRAISAL SPECIFICATIONS

### A. APPRAISAL OF LAND

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

#### 1. LAND VALUE STUDY

Land shall be valued on the basis of an analysis of all sales data occurring during the two-year period prior to October 1, 2022, or such other reasonable period of time deemed necessary by the **ASSESSOR**. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the **ASSESSOR**. The **CONTRACTOR** shall make a careful investigation of this data and shall consult owners, realtors, banks and other sources for information relative to sales of properties within the **CITY**. All factors affecting the final values of land shall be considered such as location, zoning, utilities, size, vacancy, easements, right-of-ways, form of ownership, non-conforming uses and zoning variances.

#### 2. LAND VALUE UNIT

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

#### 3. LAND VALUE MAP

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

#### 4. NEIGHBORHOOD/SPECIFIC MARKET AREA DELINEATION

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

**B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES**

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

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

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

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

Total Living Area	Number of Bathrooms
Basement Area	Other Features
Finished Basement	Heating System
Year Built	Heating Fuel
Building Style	Central Air Conditioning
Total Number of Rooms	Outbuildings
Number of Bedrooms	

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

**DATA MAILER QUALITY CONTROL PLAN**

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

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

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

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

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

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

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

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



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

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

#### **4. REVIEW as required in “Revaluation Inspection Requirements”**

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

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

#### **5. VALUATION**

Pricing and valuations of all buildings and structures must reflect the fair market value as of October 1, 2022, and shall be done from and in accordance with the previously approved manuals and schedules.

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

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

#### **1. GENERAL**

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

#### **2. DESCRIPTION**

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

#### **3. INCOME APPROACH**

Income and expense data gathered by the **CITY** shall be utilized by the **CONTRACTOR** for income producing, and, where appropriate, owner-occupied properties. Any income and expense data including OPM form number M-58 with accompanying summary reports and rent schedules shall become property of the **CITY**. All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Connecticut General Statutes Section 1-210 (formerly 1-19) Access to Public Records; Exempt

Records of the Freedom of Information Act. From these returns and other data sources, such as field investigations and interviews, the **CONTRACTOR** will establish market or economic rent and expenses for income producing properties. The **CONTRACTOR** shall also develop capitalization rates by investigating sales and income data. Rates shall be established for the various classes of property and checked by bankers, investors, and appraisers to ensure their accuracy. When the rates and methods have been approved by the **ASSESSOR**, the **CONTRACTOR** shall perform the income approach using both actual and economic income and expenses. The **CONTRACTOR** shall be responsible for entering all income data into the system.

#### 4. YARD (SITE) IMPROVEMENTS

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

#### 5. FIXED EQUIPMENT

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

#### 6. COMMERCIAL REVIEW

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

### D. QUALITY CONTROL AND CHECKS

#### 1. FIELD CHECKS

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

#### 1. BUILDING PERMITS

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

#### 3. SALES ANALYSIS

Sales analyses of properties shall be performed as a means of substantiating the values derived. These analyses shall be done on the aggregate of all residential properties and on each of the neighborhoods/market areas previously delineated. The sales analyses shall include, at a minimum, sales ratios and coefficients of variance and dispersion. Any additional requests for sales analyses by the **ASSESSOR** shall also be performed. The **CONTRACTOR** will send via first class mail a sales verification letter to all new property owners from October 1, 2020 to October 1, 2022. The letter will include a self addressed stamped envelope for the convenience of the property owner. The **CONTRACTOR** shall put a sales comparison approach on each property record card.

#### 4. PRELIMINARY CITY ACCEPTANCE

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

## IX. RESPONSIBILITIES OF THE CITY

### A. NATURE OF SERVICE

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

### B. COOPERATION

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

### C. ITEMS FURNISHED BY THE CITY

The **CITY** shall furnish the following:

#### 1. MAPS

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

#### 2. LAND DIMENSIONS

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

#### 3. EXISTING PROPERTY RECORD CARDS

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

#### 4. PROPERTY TRANSFERS

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

#### 5. BUILDING PERMITS

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

## 6. INCOME AND EXPENSE FORMS

The **CITY** shall make available all copies of the Income and Expense information (Form M-58) received by the **CITY** for the 2020, and 2021, filing period. All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section i-19 (Freedom of Information) of the Connecticut General Statutes.

## 7. SIGNING OF COMMUNICATIONS

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

## 8. MAILING ADDRESSES

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

## 9. OFFICE SPACE

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

# X. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR

## A. RECORDS

Appraisals shall be delivered and turned over for review in accordance with a schedule agreeable to the **ASSESSOR**. All appraisals of buildings either complete or under construction shall be finalized as of October 13, 2022. Final inspections and review shall take into consideration any known or apparent change in the individual property since they were first inspected. All properties shall be appraised as of October 1, 2022. All completed and/or corrected records shall be turned over to the **ASSESSOR** as of January 31, 2023.

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

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

## C. PERFORMANCE BASED REVALUATION CERTIFICATION

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

**Sample Contract**

2022 GRAND LIST OF TAXABLE PROPERTY FOR THE MUNICIPALITY OF ANSONIA

**CONTRACT**

**THE COMPLETE REAPPRAISAL AND REVALUATION OF REAL  
PROPERTY (TAXABLE AND EXEMPT) LOCATED  
WITHIN THE CORPORATE LIMITS OF THE  
City of Ansonia, CONNECTICUT, EFFECTIVE OCTOBER 1, 2022.**

This agreement, made this \_\_\_\_\_ day of \_\_\_\_\_ 2021 by and between the **CITY** of ANSONIA, a municipal corporation, located in the County of NEW HAVEN, State of Connecticut hereinafter termed the **CITY** acting by and through its **Legislative Council** having been so duly authorized and hereinafter termed the **CONTRACTOR**.

**WITNESSETH THAT:**

**WHEREAS**, the **CITY** through its **ASSESSOR**, plans to undertake a complete reappraisal and revaluation of all property located within the corporate limits of the **CITY**, and

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

**NOW**, therefore the **CITY** and the **CONTRACTOR**, under the conditions and the consideration hereinafter set forth, hereby agree to following:

**1. ENGAGEMENT OF CONTRACTOR**

The **CITY** hereby engages the **CONTRACTOR** and the **CONTRACTOR** hereby agrees to make a complete reappraisal and revaluation of all real property located within the corporate limits of the **CITY** and to perform all the services and furnish all the records, materials, forms, and supplies required by and in complete accordance with the **CONTRACT SPECIFICATIONS**. A copy is attached hereto and made a part hereof (Appendix A) all such labor, records, materials, forms and supplies to comply with the requirements of the pertinent Connecticut General Statutes and Special Acts, pertinent Regulations of Connecticut State Agencies, pertinent rulings of the Secretary of Office of Policy and Management, pertinent ordinances and agreements of the **CITY**, and pertinent decisions of several courts.

**2. COMMENCEMENT AND COMPLETION DATES**

- a. The **CONTRACTOR** agrees to commence all work on or before FEBRUARY 1, 2022
- b. The **CONTRACTOR** agrees to complete the work through the informal public hearings on or before January 31, 2023
- c. The **CONTRACTOR** agrees to adhere to the time schedule for the revaluation project as set forth in the **CONTRACT**.

**3. COMPENSATION**

The **CITY** agrees to pay the **CONTRACTOR** the total sum of \$\_\_\_\_\_ as compensation for the services to be performed. The operating systems, the database records, materials, forms and supplies shall be furnished by the **CONTRACTOR**. The **CONTRACTOR** and the **CITY** agree that the methods of billing and payments shall be set forth in

the **CONTRACT SPECIFICATIONS**. The **CONTRACTOR** shall use **EQUALITY** the **CITY'S** current in-house CAMA software system.

#### **4. TRANSFER, ASSIGNMENT AND SUBLETTING OF CONTRACT**

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

#### **5. INDEMNIFICATION AND CONDITIONS**

- a. The **CONTRACTOR** is an independent **CONTRACTOR** and shall not be construed to be an agent or employee of the CITY OF ANSONIA. The **CONTRACTOR** further agrees to indemnify, hold harmless and defend the **CITY** at the **CONTRACTOR'S** expense from any and all liability for loss, damage or expense for which it may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the operations to be performed under the **CONTRACT**. Costs and expenses for or on account of any patented or copyrighted equipment, materials, articles or processes used in the performance of this **CONTRACT** shall be the responsibility of the **CONTRACTOR**.
- b. Upon execution of this **CONTRACT**, and thereafter, no less than fifteen (15) days prior to the expiration date of any insurance policy delivered pursuant to this **CONTRACT**, the **CONTRACTOR** shall deliver to the **CITY** a certificate(s) of insurance to show compliance with the specifications.
- c. Financially responsible insurers duly licensed to do business in the State of Connecticut shall issue each policy of insurance. The insurers shall be reasonable and acceptable to the **CITY** and shall have an A.M. Best Company rating of "A/VII" or better.
- d. Each policy of insurance shall include a waiver or subrogation in favor of the **CITY** and shall provide no less than thirty (30) days' notice to the **CITY** in the event of a cancellation or change in conditions or amount of coverage.
- e. The **CONTRACTOR** will promptly notify the **CITY** of any claim or case formally brought against the **CONTRACTOR**.
- f. The **CONTRACTOR'S** Software License Agreement is attached hereto and made apart therefore as Attachment B.

#### **6. MISREPRESENTATION OR DEFAULT**

The **CITY** may void this agreement if the **CONTRACTOR** has materially misrepresented any offering or defaults on any contract with a Connecticut municipality.

#### **7. CANCELLATION**

The **CITY** shall have the right at its option and without prejudice to terminate the **CONTRACT** and withhold any payments due if the **CONTRACTOR** does not pay its debts as they become due. If a receiver is appointed for its business or its assets and not voided within sixty (60) days, the **CONTRACTOR** shall make an assignment for the benefit of its creditors or interest herein shall be sold under execution of, it shall be adjudicated insolvent or bankrupt then and forthwith thereafter.

If the **CONTRACTOR** fails to perform the **CONTRACT** in accordance with its terms or if the **CITY** reasonably doubts that the **CONTRACTOR'S** work is progressing in such a manner as to ensure compliance with the schedule of completion dates set forth in the **CONTRACT SPECIFICATIONS** and any addendum thereto, the **CITY** shall have the right, upon seven (7) days written notice to the **CONTRACTOR** and its surety bonding company to declare the contract in default and thereby terminated. The **CITY** shall then have the right to award the **PROJECT** or the remaining work thereof to another **CONTRACTOR**. If this termination clause is invoked, the **CONTRACTOR'S** agents and employees shall, at the **ASSESSOR'S** direction, vacate in an orderly fashion the office space provided by the **CITY** (if applicable), leaving behind all properly filed and indexed records, as well as any and all property of the **CITY**. Any funds held by the **CITY** under the **CONTRACT** shall become the property of the **CITY** to the extent necessary to reimburse the **CITY** for its cost in obtaining another **CONTRACTOR** and supervising the transition.

Termination of the **CONTRACT** and retention of funds by the **CITY** shall not preclude the **CITY** from bringing an action against the **CONTRACTOR** for damages or exercising any other legal, equitable or contractual rights the **CITY** may possess in the event of the **CONTRACTOR'S** failure to perform.

IN WITNESS HEREOF OF THE CITY OF ANSONIA, CONNECTICUT AND

IN THE PRESENCE OF:

CITY OF ANSONIA, CONNECTICUT

\_\_\_\_\_  
Witness Date

BY: \_\_\_\_\_  
\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness Date

\_\_\_\_\_  
\_\_\_\_\_  
Date

Have executed this **CONTRACT** on the date first mentioned above.