

## REQUEST FOR PROPOSAL FOR REVALUATION PROJECT FOR THE TOWN OF NORTH CANAAN, CONNECTICUT

The Town of North Canaan, Connecticut, (hereinafter termed Town), is undertaking a project to complete a full ten year revalue all Real Property, effective October 1, 2022. Contractors interested in providing the Revaluation Services set forth in the attached Specifications are invited to deliver three copies of the proposal to the Office of the First Selectman 100 Pease Street #2, North Canaan, CT 06018 no later than 1:00 pm on June 22, 2021, at which time and place such proposals will be opened and read.

All proposals shall be sealed, addressed to the Office of the First Selectman and marked: "Town of North Canaan Proposal for 2022 Revaluation Services". The attached bid form should be completed as requested.

All information pertaining to the Contractor's technical and management approach to completing this project, as well as the proposed cost, timetable and staffing plan, shall be presented in the proposal. The proposal must address each of the items set forth in the Request for Proposal in order to be considered responsive. Any proposal that does not respond to each item in the Request for Proposal shall be rejected by the First Selectman as non-responsive.

The Town reserves the right to reject any, or any part of, or all Proposals: to waive informalities and technicalities: and to accept the Proposal which the Board of Selectmen and the Assessor deem to be in the best interest of the Town, whether or not it is the apparent lowest dollar Proposal.

Consideration in the awarding of the Contract will be given to price, prior experience and competence of the Contractor, the nature and size of the Contractor's organization and familiarity with the area, and the quality of similar projects the Contractor has completed in the past.

In addition to addressing each of the items in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. 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.
2. A list of Connecticut Municipalities for which the Contractor has completed Revaluation Programs.
3. A list of Connecticut Revaluation Contracts for which the Contractor is currently committed and the CAMA software being utilized for each contract.
4. Description of the Contractor's public relations program that would be used during the revaluation.
5. Copy of Contractor's current Connecticut Revaluation Certificate, which must be held valid from the time of submission of the bid through completion of all work.
6. Description of the CAMA system, including (1) valuation methodology, (2) necessary computer hardware specifications, (3) operating system software.

## CONTRACT SPECIFICATIONS

### 1 DEFINITIONS

- 1.1 Assessor: The word "Assessor" shall mean the duly appointed Assessor of the Town of North Canaan.
- 1.2 Project: The word "project" shall mean the revaluation of all taxable real property and non-taxable real property in the Town of North Canaan for tax assessment purposes.
- 1.3 Contractor: The word "Contractor" shall hereinafter mean the Contractor who will perform this project.

### 2 SCOPE OF REVALUATION

- 2.1 Basic Scope: Contractor understands that the project requires the complete ten year reappraisal and revaluation of all taxable and non-taxable real property within the Corporate Limits of the Town. Proposal must include a break down in the cost for the use of data mailers along with the data mailer procedures. All work for the project shall be in accordance with these contract specifications.
- 2.2 All work to be carried out in this project, as well as all forms, materials, supplies, and software programs utilized by Contractor, shall conform to and be executed in accordance with the Connecticut General Statutes and the Rules and Regulations of the Secretary of the Office of Policy and Management pertaining hereto and shall be subject to the approval of the Assessor.
- 2.3 The Town is currently licensed to utilize the eQuality CAMA software. Data entry may be done off-site. The live data must be available to the Assessor at all times for data review and to enable the Assessor to enter data, such as transfers, address changes, splits, building permits and 490. Any software updates, changes and training costs must be specified in the Proposal. Any updates to the CAMA software must be loaded in before starting the project. The system must be fully loaded with all assessment data before the hearings and at the completion of the project. All data entry will be the responsibility of the Contractor, unless otherwise noted herein. One experienced data collector is to be used for inspections. Field report turn-around time is to be no longer than two weeks.
  - 2.3.1.a The value to be determined by Contractor shall be the full fair market value, as defined in Section 12-63 of the Connecticut General Statutes and shall be based upon nationally recognized methods of appraising. The validity of the sales for the past two years shall be determined by the Contractor and the Assessor. The Contractor shall calculate both full values and the 490 values.
  - 2.3.1. b The Contractor shall value all newly constructed improvements created prior to 10/1/2022, or those incomplete as of this valuation date, and these parcels shall be included in the contract price and valued in the same manner as stated above, and as provided hereinafter. The



Contractor's revaluation program will cover and include all land, buildings and improvements in the Town of North Canaan. Inspections, and data entry and possibly data mailers for improved residential properties to be done by the contractor along with current building permits, unfinished construction from prior years and full inspection of special properties.

2.4 Effective Date: The effective date of this revaluation project shall be on the Grand List of October 1, 2022, and the pricing and valuation by Contractor of all land, buildings and property under this contract shall reflect a fair market value as of October 1, 2022.

2.5 Parcel Count:

Contractor's price for the revaluation is based upon the following anticipated parcel counts:

Improved Residential Parcels	1212
Vacant Parcels	232
Commercial Parcels	167
Industrial Parcels	49
Use Assessment	177
Apartments	28
	1865 Estimated

2.6 Current basis of assessment is 70%.

2.7 The current Mill Rate is 28.25.

2.8 Taxable Grand List as of October 1, 2020 was \$266,010,010.

2.9 The last revaluation was effective as of October 1, 2017.

2.10 The 2020 population estimate is 3255.

2.11 The area of the Town is 19.47 square miles.

2.12 The maps will be updated for 10/1/2021

2.13 Number of sales to be reviewed: estimated 100-150

2.14 Number of Building Permits and prior year's unfinished construction: estimated 150.

2.15 Number of buildings to be inspected other than listed in 2.14 no more than 300 depending on the use of data mailers.

2.16 The current CAMA system is eQuality.

2.17 The current Tax Billing System is Quality Data Services, Inc.

2.18 List of unique properties: Train Station, Church, Nursing Home, Rehabilitation Facility and commercial properties including but not limited to gravel mines.

### 3 PERSONNEL AND OFFICE HOURS

- 3.1 Personnel: Contractor shall provide experienced and qualified personnel, as hereinafter provided, and will comply with the requirements of the equal employment opportunity provisions of federal and state governments. Contractor shall submit to the Town written qualifications of all personnel assigned to this project.

Qualifications of Personnel: Contractor will comply with Connecticut Revaluation Certification Standards. All personnel will be subject to the approval of the Assessor. Coordination challenges of a part-time office for both the Town and the Contractor should be reviewed prior to starting the project.

- 3.2 Identification: All Contractor field personnel shall carry suitable I.D. cards, which shall include an up-to-date photograph, supplied by Contractor and signed by the Assessor or First Selectman. All automobiles used by Contractor's field personnel shall be registered with the Selectman's Office and/or Resident Trooper giving license number, make, model year and color of the vehicle.
- 3.3 In-House Office Space: Contractor may use the Assessor's office at the Town Hall from the commencement of work on this project through the conclusion of the Board of Assessment Appeals meetings. Any Covid restrictions remaining in place at that time must be followed.
- 3.4 Conflict of Interest: No Town employee or resident shall be employed by Contractor, except in a clerical capacity, without the approval of the Assessor.

### 4 PROTECTION OF THE TOWN

- 4.1 Bonding: Contractor will secure the faithful performance of the terms of this agreement by furnishing to the Town a performance surety bond in the amount of this contract, which bond shall be issued by a reputable bonding company licensed to do such business in the State of Connecticut. Said bond shall be delivered to the Town prior to the commencement of actual work and shall be in a form satisfactory to and approved by the Town's attorney. This bond shall include the appeal requirements of these specifications.

It is understood and agreed that, upon completion of approved delivery to the Town of the revaluation, that the performance bond shall be reduced to 10 percent of the value of the contract to cover the defense of all appeals. This reduced amount of bond shall become effective after the revaluation has been completed and approved by the Assessor and after the completion of the duties of the Board of Assessment Appeals, as defined herein. The reduced amount of the bond shall remain effective for one complete calendar year beyond completion of the revaluation and/or until a final resolution in the courts of any timely appeals taken from the doings of the Board of Assessment Appeals on the Grand List of October 1, 2022 whichever may come first.



- 4.2 Insurance: Contractor will, at its own expense, provide and keep in force Workers Compensation Insurance: (per Connecticut Law) and Employer's Liability Coverage, Coverage A at statutory limits and Coverage B at limits of \$100,000/ \$500,000/ \$100,000.
- 4.2.1 Broad Form Commercial General Liability Coverage: Which names the Town as additional insured, written on a 'per occurrence' basis and with an aggregate cap no less than three (3) times required limit: \$2,000,000 Combined Single Limit (C.S.L.).
- 4.2.2 Automobile Liability Coverage: including coverage for owned, hired or borrowed vehicles, \$2,000,000 Combined Single Limit (C.S.L.).
- 4.2.3 Defense of Town: All insurance companies shall have the duty to defend the Town against liability or property damage claims arising from the conduct of Contractor and/or agents or employees.
- 4.2.4 Insurance Certification: An Insurance certificate shall be required to be filed with the Town, certifying coverage and limits of automobile, bodily injury liability, property damage liability and Worker's Compensation.
- "The Town is named as Additional Insured on the Insurance coverage named herein for the claims arising out of the Company's performance of the contract herein".
- 4.2.5 Patent/Copyright Liability: Contractor shall save the Town harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of the contract.
- 4.2.6 Penalties: Failure by Contractor to complete all work prior to the date specified herein, 1/10/23, shall be cause for a penalty payment by Contractor, on request of the Assessor, in the amount of Five Hundred Dollars (\$500.00) per day beyond the specified date of completion, provided the Town delivers its responsibilities.
- 4.3 Bankruptcy, Receivership, Insolvency: If Contractor, with the result that it does not pay its debts as they become due, or if a receiver shall be appointed for its business or its assets and not voided within 60 days, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt, then and forthwith thereafter, the Town shall have the right, at its option and without prejudice to its rights hereunder, to terminate the contract.
- 4.4 Termination: If either party fails to fulfill in a timely and satisfactory manner their obligations under this agreement, or shall violate any of the covenants, conditions or stipulations of this agreement, which failure or violation shall continue for 30 days after written notice of said failure or violation is received by the offending party, unless the correction of such failure inherently requires a longer period of time and provided further that the applicable party is proceeding diligently to correct the failure, then the opposing

party shall thereupon have the right to terminate this agreement by giving written notice to the offending party of such termination and specify the effective date thereof, at least seven (7) days before the effective date of such termination.

In the event of termination, all finished work and documentation, complete and incomplete, shall, at the option of the Assessor, be delivered to them. Contractor shall be entitled to the release of the performance bond and to receive just and equitable compensation for any work performed under this agreement completed prior to the date of termination.

Notwithstanding the above, in the event of termination, neither party shall be relieved of liability by virtue of its breach of this agreement.

- 4.5 Hold Harmless Agreement: Contractor shall, at all times, defend, indemnify, protect and save harmless, the Town and its officers, agents and employees from any and all claims or demands for damage for bodily injury, including death or property damages sustained by any party, including officers, agents and employees of Contractor. Said hold harmless clause shall include, but not limited to investigation, defense and settlement or payment or judgment of any liabilities.
- 4.6 Severability: In the event any part of any clause or provision of this contract or contract specifications is judicially determined to be unenforceable, it shall be deemed severable from the remainder of that clause or provision and such remainder shall be binding upon the parties to this contract.
- 4.7 Waiver: No action or failure to act by the Town shall constitute a waiver of any right or duty afforded it under the contract or contract specifications nor shall it prohibit the Town from future exercise Plot Plans of any such right.
- 4.8 Misrepresentation or Default: The Town may void this agreement if Contractor has misrepresented any offering or defaults on any contract with Connecticut municipality. Contractor shall, also, immediately notify the Town of any claim or case formally brought against Contractor.

## 5 COMPLETION DATE AND TIME SCHEDULE

- 5.1 Within a reasonable time after opening of the Bid Proposals, the Town shall award the contract for this project. The Town reserves the right to reject any, or any part of, or all Proposals: to waive informalities and technicalities, and to accept the Proposal which the Board of Selectmen and the Assessor deem to be in the best interest of the Town, whether or not it is the apparent lowest dollar Proposal.
- 5.2 Within a reasonable time but not later than 60 days after receipt of notice of acceptance by the Town of its bid, as possibly revised by negotiations, the Contractor shall execute with the Town a contract in the form agreeable to the Town and incorporating these contract specifications.
- 5.3 The revaluation work will be started at the convenience of the Contractor, but no later than 5/2/2022, provided the Town delivers maps, present records with owners addresses, property transfers and building permits, and will continue in a diligent manner so as to ensure completion within the schedule of completion dates set forth below.



- 5.4 Building permits and inspections to be completed by 10/4/2022.
- 5.5 On site review of all sales that occurred two years prior to assessment date, two years may be extended if necessary, to be completed by 10/4/2022.
- 5.5.1 Final analysis to be completed by 10/25/2022.

The Contractor will field review all parcels after values have been set to verify that the application of the valuation methodology employed has resulted in the uniform and consistent valuation of comparable properties.

- 5.5.1.a Deliver updated CAMA database and Real Estate property cards with photos, sketches, measurements, listings, pricing, and suggested values including PA 490 land pricing, to the Assessor by 11/01/2022.
- 5.5.1. b Assessor completes review by 11/15/2022.
- 5.5.1. c Assessment notices mailed to comply with requirements of Connecticut State Statutes by 11/22/2022. (Contractor to pay postage)
- 5.5.1. d Informal hearings will begin no later than 11/28/2022 and end by 12/16/2022
- 5.5.1. e Notices of results finalized after the informal hearings are to be mailed out, computer file updated and final property record cards printed no later than 12/27/2022.
- 5.6 Revaluation Certification signed by project supervisor with required documentation by 1/10/2023.
- 5.7 Delays: Contractor shall not be liable for delays caused by reasons of war, strike, explosion, acts of God, order of court or other public authority.

## 6 PAYMENT SCHEDULE

- 6.1 Periodic Payments: Payments shall be paid in the following manner: 30 days after the execution date of this contract and at the end of each 30 day period thereafter covered by this contract, Contractor will certify, by written progress report to the Assessor, the percentage of total work completed during the said 30 day period. The Town will review each report and within ten business days of receipt, either approve it for payment as follows or return it to Contractor with a written statement of reasons for its rejection. Upon determination by the Assessor that Contractor's work during said period is accurate, will pay Contractor a percentage of the total contract price equal to the percentage of work performed less 10 percent, which is to be retained by the Town to ensure full and satisfactory performance of the contract.

Upon completion of the duties of the Board of Assessment Appeals, with respect to the October 1, 2022 Grand List, and upon determination by the Town and certification by the Assessor that Contractor has performed fully and satisfactorily all its obligations and requirements under the

contract and/or contract specifications, the retained 10 percent of the contract price will be paid to Contractor.

- 6.2 Fiscal Year Limitations: The contract cost shall be paid in the 2021/2022, and 2022/2023 Town fiscal years according to the provisions of this section and subject to the appropriation of necessary funds by the City's fiscal authority. Contractor shall incur no cost in any fiscal year in excess of that year's annual appropriation plus the balance of prior years' unexpended appropriations.

- 6.3 Suggested Schedule and Percentage of Completed Work:

**% OF TOTAL STAGES OF COMPLETION PROJECT COST**

- 6.3.1 Planning, organization, information meeting with Boards of Selectmen and Finance 15%
- 6.3.2 Building Permits 10%
- 6.3.3 On site review of sales that occurred two years prior to assessment date 10%
- 6.3.4 Residential and Commercial analysis and valuation 15%
- 6.3.5 Final field review after values have been generated 15%
- 6.3.6 CAMA upgrade and training 5%
- 6.3.7 Information update and meeting as needed with Town Officials and Public 5%
- 6.3.8 Informal Hearings and Notices 10%
- 6.3.9 Project finalization and meetings as needed with Board of Assessment Appeals before and after Board hearings 15%
- 6.3.10 TOTAL.....100%

## **7 RESPONSIBILITIES OF CONTRACTOR**

- 7.1 Public Relations: Contractor recognizes that good public relations are required in order that the residents and taxpayers of the Town may be informed as to the purpose, benefits and procedures of the revaluation program. Contractor shall provide reasonable assistance to the Assessor in conducting a program of public information through the press and other media, such as meeting with citizens, property owner groups, Boards of Finance and selectmen as a means of establishing an understanding of, and support for, the revaluation program and sound assessment administration. Contractor shall supply visual aids and other media at its disposal to this end. All public releases will be approved by the Assessor prior to its release.

- 7.2 Conduct of Contractor Employees: As a condition of this contract, Contractor's employees will, at all times, treat the residents, employees and taxpayers of the Town with respect and courtesy; Contractor shall take appropriate and meaningful disciplinary measures against those who persistently violate such terms of this provision.

- 7.2.1 Identification: The Contractor shall furnish photo identifications of employees to be signed by the First selectman and a copy kept with the First Selectman.

- 7.3 Contractor shall provide a management plan at signing of contract.

- 7.3.1 General Provision: Contractor will provide all record cards, street cards, supplies, equipment, forms, literature and papers to be used in this project at no additional cost to the Town.



7.3.2 Contractor may, at its option and at no cost to the Town, utilize computers for its information processing, provided that the computer and appropriate machine-readable databases

(such as magnetic tape and/or other automated storage media) are located in the Town, or elsewhere if the Assessor gives consent with whatever conditions and reservations he may deem appropriate to the interest of the Town.

7.3.3 Additional Supplies: 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 required by Connecticut General Statutes.

7.3.4 Records are Town's Property: The original or a copy of all records and computations, including machine-readable database, made by Contractor in connection with any appraisal of property in the Town shall, at all times, be the property of the Town and, upon completion of the project or termination of this contract by the Town, shall be left in good order in custody of the Assessor. Such records and computations shall include, but not be limited to:

7.3.4. a Land value maps

7.3.4. b Listing cards, owner cards, street cards with property valuations and separate sketch cards, (if any)

7.3.4. c Sales data

7.3.4. d Capitalization rate data

7.3.4. e Depreciation tables

7.3.4. f Computations of land and building values

7.3.4. g Operating statements of income properties

7.3.5 Property Record Cards: Contractor will complete property record cards, commonly referred to as "street cards", filed by map and lot.

7.3.6 Valuation Information (PROPERTY RECORD CARDS): 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, with the breakdown of front feet, square feet or acreage as applicable, along with unit of value applicable to each, public utilities available, public improvements, zoning regulations in effect as of the assessment date.

7.4 Building Permits: The Contractor will go out on building permits issued and made available by the Assessor. The Contractor will value all newly constructed improvements created prior to 10/1/2022 and those incomplete as of this valuation date.

7.5 Assessment Notices: At the close of the revaluation, a notice shall be sent, at Contractor's expense including envelope by First Class Mail, to each owner of record, setting forth the

valuation that has been placed upon the property identified in the notice, provided old assessments are provided on magnetic media and in conformity with the Connecticut General Statutes. Further, enclosed with such notice shall be a letter specifying the dates, times and place of the informal public hearings. Such notices and letters shall be subject to the prior written approval of the Assessor. A duplicated copy, arranged alphabetically by the owner's name, shall be left with the Assessor.

- 7.6 Informal Public Hearings: At a time mutually agreeable to the Assessor and Contractor, but following completion of all review work by the Assessor and Contractor, Contractor will hold informal public hearings at such times and at such locations as the Assessor may specify so that owners of real property, or their legal representatives, may appear at specified times to discuss with qualified members of Contractor's staff the manner and methods of arriving at value. Informal public hearings, at the Assessor's discretion, may be held on weeknights and Saturdays. Contractor will provide a sufficient number of qualified personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made where warranted. The public hearings shall be completed by 12/16/2022

Contractor will provide person(s), or their legal representative, who appear(s) at a hearing, a form indicating whether or not Contractor will re-inspect the property(s) being questioned. Such decision to re-inspect will be at the reasonable discretion of Contractor. Any such re-inspection shall be made as soon as possible. This form shall be approved by the Assessor and provided by Contractor. The completed and signed forms shall be turned over to the Assessor at the conclusion of the hearings. Contractor will, at its own expense by First Class Mail, notify each taxpayer who has appeared at an informal public hearing of the results of that hearing as soon as the results are determined, and the form of such notices shall be subject to the prior expressed approval of the Assessor.

- 7.7 Board of Assessment Appeal: Contractor will have a qualified member or members of its staff with first-hand knowledge of the project and Contractor's duties under the contract, available upon request, for attendance at any deliberations of the Board of Tax Review held after the completion of the revaluation, Sunday's excluded, to assist in the settlement of complaints and to explain the valuations made; but such availability and attendance shall not be required after the date for the completion of the duties of the Board Assessment Appeals with respect to the October 1, 2022 Grand List, or for one complete calendar year beyond completion of the revaluation, whichever comes first.
- 7.8 Information: Contractor will give the 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 Appeal on the October 1, 2022 Grand List without further cost the Town.

7.9 Building Cost Schedules:

- 7.9.1 General: Contractor will prepare building cost schedules for usage in the program hereinafter specified. These schedules will reflect the unit-in-place method, based upon square foot or cubic foot area of building, as applicable. These schedules shall be used in computing the replacement cost in the 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 shall be proven by testing against known sales. All finalized schedules shall be approved by the Assessor before their adoption and usage by Contractor.

- 7.9.1. a Residential: Residential cost schedules will include schedules for various classifications, types, models and story heights normally associated with the residential buildings. The schedule will be flexible, with special sections reflecting the various additions and deductions for construction components from the base specifications such as insulation, wall and floor types, interior finish, etc., along with prices for different types of heating systems, bathrooms, fireplaces, porches, breezeways, attached and unattached as well as basement garages, and schedules for other building improvements usually found on residential property (swimming pools, barns, sheds, garages, tennis courts, greenhouses, solar designed, etc.)
- 7.9.1.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 additions and deductions for construction components from base specifications.
- 7.9.1.c Industrial and Special Structures: Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis , and shall be prepared to contain all the additions and deductions for construction components from base specifications.
- 7.9.1. 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.
- 7.10 Depreciation Schedules: The depreciation schedules or methods Contractor will use in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of building according to classification. These schedules or methods shall cover residential, commercial, industrial and farm buildings, and shall be approved by the Assessor prior to their use by Contractor.
- 7.11 Schedules for Town: Contractor will supply and leave for the Town not less than three copies of all the above required building cost schedules and depreciation schedules for the Town's usage, one copy of which shall be turned over to the Assessor upon approval of the schedules, as outlined herein. The schedules shall be in the form of a bound manual.

## 8 APPRAISAL SPECIFICATIONS

- 8.1 The Contractor will appraise all Real Estate with in the Town: residential, vacant, commercial, Industrial, agricultural, special use, public utility, and exempt.

All properties shall be reviewed in the field by Contractor's personnel qualified as reviewers, as previously prescribed in these contract specifications. The properties shall be reviewed for classification, correct listing of information, final value and to assure that they are correlated to comparable properties. The Assessor shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation.

Land shall be valued on the basis of an analysis of all sales data occurring during the two year period prior to 10/1/ 2022. The analysis and application of sales data shall be governed by accepted procedures and techniques required that meet the requirements of the Connecticut General Statutes.

- 8.2 Land Value Units: Contractor will prepare land unit values, by front foot, square foot, acreage or fractional acreage, or site value, whichever, in the judgment of the Assessor, most accurately reflects the market for the appraised land.
- 8.3 Neighborhood Delineation: After consideration of the environmental, economic and social characteristics of the Town, Contractor will, with the cooperation of the Assessor, delineate "neighborhood" units within the Town. Each neighborhood unit will, in Contractor's opinion, exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code which will be used for valuation. These neighborhood numbers shall be recorded and maintained on street cards and the computer database.
- 8.4 Income Approach: Income and expense data gathered by the Town shall be utilized by Contractor for income producing properties. Any income and expense data, including OPM Form Number M-58 with accompanying summary reports and rent schedules, when used by Contractor shall become the property of the Town.

All information filed and furnished shall not be of public record and is not subject to the provisions of Section 1-210 (Freedom of Information) of the Connecticut General Statutes. From these returns and other data sources, Contractor will establish market or economic rent and expenses for income producing properties.

## 9 RESPONSIBILITIES OF THE TOWN

- 9.2 Cooperation: The Assessor, Town and Town employees will cooperate with and render all reasonable assistance to Contractor and its employees.
- 9.3 Items Furnished by the Town: The Town shall furnish or make available the following:
  - 9.3.1 Maps: The Town shall furnish one set of updated Town tax maps showing street, property lines and parcel identification numbers, and total acreage of all pieces of property.
  - 9.3.2 Zoning: Town shall make available current Town zoning regulations.
  - 9.3.3 Record Cards: The Town will make available a copy of the present CAMA data base.
  - 9.3.4 Property Transfers: The Contractor shall immediately make available to the Assessor the live data for entering all property transfers and splits occurring after the initial data base is copied by the Contractor.



Building Permits: The Town shall make available all building permits or copies thereof during the course of the revaluation project up to October 1, 2022. All building permits shall be returned to the Town.

- 9.3.5 Signing of Communications: The Town shall sign, by the Assessor or First Selectman, communications to be mailed at Contractor's expense for the purpose of contacting a property owner for inspection of the property and for the purpose of obtaining the property owner's income and expense information, if such is needed for the income approach to value of commercial or industrial properties.
  - 9.3.6 Office Space: The Town shall furnish to Contractor sufficient office space to carry out the terms of this contract.
  - 9.3.7 Sales Information: The Town shall continuously and currently provide copies of all sales information available to it with respect to transfer of parcels.
  - 9.3.8 The Town will be permitted to make copies of the application software for backup purposes, as defined in the Software License Agreement.
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- 9.4 Responsibilities of the Town and Contractor: The Town will consider the software a trade secret of Contractor and will take all steps necessary to protect the confidentiality of the software by signing a Software License Agreement. Contractor agrees to warrant said software under the software license for three months following installation. Contractor also agrees to make available software modifications at a reasonable cost after this time period.

## 10 TRANSMITTAL OF RECORDS TO THE ASSESSOR

All appraisals of buildings, either completed or under construction and all completed and corrected records shall be turned over to the Assessor at completion of project.

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the Connecticut General Statutes and the Rules and Regulations of the Secretary of the Office of Policy Management, unless otherwise provided herein. Contractor, through its supervisor, shall be responsible to the Assessor and, at regular intervals, shall meet with said Assessor to discuss the progress and various other details of the project.

**TOWN OF NORTH CANAAN  
OCTOBER 1, 2022 REVALUATION BID PROPOSAL FORM**

This form is to be submitted in triplicate.

Please break down your bid in the following manner:

1. Lump Sum Bid Price: \_\_\_\_\_  
(In words)

\$ \_\_\_\_\_  
(In figures)

Bid Break Down:

1. Software Cost \$ \_\_\_\_\_

2. Software Updates \$ \_\_\_\_\_

3. Software Training \$ \_\_\_\_\_

4. Annual Fee Estimate \$ \_\_\_\_\_

5. All Other Costs for Example Data Mailers \$ \_\_\_\_\_

Submitted by:

Name of Company, Corporation, Partnership or  
Individual:

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Name of Authorized Signer: \_\_\_\_\_

Signature of Authorized Signer: \_\_\_\_\_

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