

INVITATION FOR PROPOSAL
COVER SHEET
TOWN OF STRATFORD
(Assessor's Office/Purchasing Department)
STRATFORD, CONNECTICUT 06615

RFP 2018-037:

ISSUED: August 31, 2018

DATE OF PROPOSAL OPENING: **October 1, 2018**

TIME OF PROPOSAL OPENING: **3:00 PM**

LOCATION OF PROPOSAL OPENING: **Town Hall Purchasing Office, 2725 Main Street, Stratford CT 06615**

SUMMARY DESCRIPTION OF PROPOSAL: **October 2019 Property Revaluation**

Sealed Proposals will be received at the Purchasing Department, Town Hall; 2725 Main Street, Stratford, Connecticut until Date and Time listed above at which time the Proposals will be opened and read aloud. Late Proposals will not be accepted – **no exceptions. Submittal of response by fax is not acceptable.**

The Mayor, his designee, or Department Head may reject or accept any or all Proposals in whole or in part or to waive any informality in the Proposals received if, in his/her opinion, it is in the best interests of the Town to do so.

Proposals may be held by the Town of Stratford for a period not to exceed 6 months from the date of the Proposal opening for the purpose of reviewing the Proposals and investigating the qualifications of the VENDOR prior to awarding the contract.

Should the VENDOR find any omissions, discrepancies or errors in the specifications or other Contract Documents or should he be in doubt as to the meaning of the specifications or other Contract Documents, he should immediately notify the Town, which may correct, amend or clarify such documents by a written interpretation or addendum. No oral interpretations shall be made to any VENDOR and no oral statement of the Town shall be effective to modify any of the provisions of the Contract Documents.

If this is the only page you receive you may request additional proposal information and proposal documents by contacting the Assessor at 203-385-4025.

Please submit five (5) copies of completed Proposal forms and attachments

INVITATION FOR PROPOSAL
OUTLINE OF DOCUMENTS
TOWN OF STRATFORD

RFP 2018-037:

ISSUED: **August 31, 2018**

DATE OF PROPOSAL OPENING: **October 1, 2018**

TIME OF PROPOSAL OPENING: **3:00 PM**

LOCATION OF PROPOSAL OPENING: **Town Hall Council Chambers,
 2725 Main Street, Stratford**

SUMMARY DESCRIPTION OF PROPOSAL: **October 1, 2019 Property Revaluation Project**

CONTENTS OF PROPOSAL DOCUMENT

Description	Yes	No
Invitation to Proposal Cover Sheet	X	
Outline of Proposal Documents	X	
Instruction to Vendors & General Conditions	X	
Technical Specifications and/or Scope of Work	X	
Proposal Form	X	
Non-Collusive Statement	X	
Affirmative Action Statement	X	
Form W-9	X	

DOCUMENTS OR REQUIREMENTS NEEDED FOR THIS PROPOSAL

Description	Yes	No
Proposal Form	X	
Non-Collusive Statement	X	
Affirmative Action Statement	X	
Form W-9	X	
Pre-Proposal Conference Attendance		X
Certificate of Insurance	X	
Proposal/Bid Bond	X	
100% Performance Bond – submitted at time of contract award	X	
Labor & Materials Bond – submitted at time of contract award		X
Vendor References	X	
Samples and/or Descriptive Literature	X	
Prevailing Wage Requirements		X

I. INSTRUCTIONS TO VENDORS & GENERAL CONDITIONS

All Vendors shall observe the following instructions and specifications:

1. PROPOSAL COMPLIANCE

Proposals shall be submitted on the enclosed forms. Incomplete forms may be cause for disqualification of the Proposal. Authorized Representative/Agent of the VENDOR must sign Proposals. **Please submit five (5) copies of completed Proposal and attachments**

The Town of Stratford, hereinafter termed the TOWN shall be the sole judge as to whether any Proposal complies with these specifications, and such a decision shall be final and conclusive. VENDOR shall state any exceptions taken to the Proposal specifications.

2. PROPOSAL RETURN ENVELOPE

All Proposals shall be submitted in sealed, opaque envelopes clearly labeled with the name of the Vendor, his address and the words "PROPOSAL DOCUMENTS". Please **clearly mark** your envelope with the **Proposal title** and **opening date** as to prevent opening of a sealed Proposal prior to the opening date. Proposals submitted in unmarked envelopes which are opened by the TOWN in its normal course of business, will not be accepted. If time permits, the proposals will be returned to the VENDOR informing them that the proposal may be resubmitted in a sealed envelope properly marked as indicated above.

3. PROPOSAL PRICE

Each Proposal must be submitted on the prescribed form and all blank spaces for Proposal prices must be filled in ink or typewritten in both words and figures. Proposal prices shall include all labor, materials and equipment necessary to complete the work in accordance with the contract documents or these specifications and instructions. All prices must be NET, F.O.B. Stratford unless otherwise indicated. Vendors may quote on any or all items.

Negligence on the part of the VENDOR in preparing his Proposal confers no right of withdrawal or modification of his Proposal after such Proposal has been opened.

The Town of Stratford is exempt from State or Federal taxes.

4. WITHDRAWAL OF PROPOSALS

Proposals may be withdrawn personally or in writing (letter form or faxed) by the VENDOR in time for delivery in the normal course of business prior to the time fixed for

opening. Once Proposals are opened the prices shall remain firm for sixty (60) days after the Proposal opening.

5. RIGHT OF REJECTION

The Mayor, his designee, or Department Head may reject or accept any and all Proposals in whole or in part or to waive any informality in proposals received if in her opinion, it is in the best interest of the TOWN to do so.

6. METHOD OF AWARD - PROPOSAL/VENDOR

The TOWN, reserves the right to reject any, any part of, or all PROPOSALS; to waive informalities and technicalities and to accept that PROPOSAL from a qualified bidder which the TOWN and the ASSESSOR deem to be in the best interest of the TOWN whether or not it is the lowest dollar amount.

Consideration in the awarding of the contract will be given, but not limited to, price, the accuracy and responsiveness of the PROPOSER, the experience, competence and financial condition of the PROPOSER, time for completion and/or labor force adequate to perform the work, the nature and size of the PROPOSER'S organization, quality of similar projects it has performed and completed in the past in Connecticut, experience in utilizing the TOWN'S CAMA software, and a determination by the TOWN that the PROPOSER has the ability to complete the PROJECT successfully.

Prior history with the TOWN, references, public information and/or demonstrated ability to satisfactorily perform the Contract with existing resources and personnel may all be factored into determining if a VENDOR is qualified.

The TOWN reserves the right to interview the PROPOSERS as a method to determine the most qualified.

The TOWN reserves the right to split the Proposal Award if it is in the TOWN's best interest.

In the event that there is a discrepancy between price written in words and in figures, the price written in words shall govern.

7. PROPOSAL/BID BOND

Each proposal must be accompanied by a certified check of the VENDOR or a Proposal/Bid bond with a surety acceptable to the TOWN in the amount equal to at least

FIVE PERCENT (5%) of the Proposal amount. The successful Vendor, upon his failure or refusal to execute and deliver the Contract, certificates of insurance or bonds required within FIVE (5) days of written notification, unless otherwise agreed upon, shall forfeit to the TOWN, as liquidated damages for such failure or refusal, the security deposit submitted with his Proposal. Should the low VENDOR have previously failed to complete its performance satisfactorily on a prior contract with the TOWN, before award, such VENDOR shall have five (5) days to post a cash bond in an amount deemed by the TOWN to adequately cover the difference between the low Proposal and the next lowest responsible Vendor. Such cash bond shall be forfeited in its entirety in the event the CONTRACTOR fails to execute a contract in accordance with these specifications.

8. FAMILIARITY WITH LAWS, SITE CONDITIONS AND DOCUMENTS

Each VENDOR is required to be familiar with and to comply with the terms and conditions of the specifications and all other contract documents and with all Federal, State and Local Laws, Ordinances or Regulations which in any manner relate to the furnishing of the equipment, material or services in accordance with the Contract.

Each VENDOR shall thoroughly familiarize himself with all conditions of the Proposal documents and specifications before preparing his proposal. The submission of a proposal shall be construed as an assurance that such examination has been made, and the failure of the VENDOR to familiarize himself with conditions related to the specifications shall in no way relieve any VENDOR from any obligation in respect to this Proposal.

Each VENDOR shall be responsible for the conduct of its agents, servants and/or employees. VENDOR shall not for itself and shall not permit any of its officers, employees, representatives, volunteers or participants to violate the law or regulation of any government entity or to undertake any activity or issue any communication that would cause embarrassment or humiliation to the TOWN or any of its employees, representatives or officials. Vendor's failure to abide by this section shall be sufficient cause for termination of any agreement with VENDOR relating to the Proposal.

9. QUALIFICATIONS OF VENDOR

The TOWN may make such investigations as it deems necessary to determine the ability of the VENDOR to perform the work, VENDOR shall furnish to the TOWN all such information for this purpose as the TOWN may request. The TOWN reserves the right to reject any Proposal if the evidence submitted by, or investigation of VENDOR fails to satisfy the TOWN that such VENDOR is qualified to carry out the obligations of the contract and to the work contemplated therein.

10. ERRORS, INTERPRETATIONS AND ADDENDA

Should the VENDOR find any omissions, discrepancies or errors in the specifications or other Proposal Documents or should he be in doubt as to the meaning of the specifications or other Proposal Documents, he should immediately notify the TOWN, which may correct, amend or clarify such documents by a written interpretation or addendum. All information given by the TOWN except by written addenda shall be informal and shall not be binding upon the TOWN nor shall it be furnished as a basis for legal action by any VENDOR against the TOWN.

11. TRADE NAMES OR SUBCONTRACTING

Should brand name/trade name items appear in these specifications, before submitting a proposal on any item considered equal to or better than a named item the VENDOR shall get written approval of the Finance Director for the substitution. This shall hold true unless the specifications say "or equal". The "Or Equal" clause is intended merely to establish a standard; any material, article, or equipment of other manufacturers and vendors which will perform adequately the duties imposed by the general design will be considered equal provided it is in the opinion of the using agency and Finance Director to be of equal substance and function.

The CONTRACTOR shall not subcontract the work under this project without written approval of TOWN, unless allowed in the Technical Specifications.

12. GUARANTEED WARRANTY

All vehicles, equipment and materials including all parts and assemblies, if applicable, shall be guaranteed against defects in material and workmanship for a period of at least one (1) year after acceptance. Guarantee shall commence at the time of official acceptance by the Mayor or designee. Where it is required for the VENDOR to repair, replace or to modify, alter, add or remove hardware, parts, components or related accessories for the purpose of insuring proper appearance, performance or operation, such operations shall be done as required by the VENDOR until such time as acceptable performance has been established. Problems that may occur shall be corrected in an appropriate fashion under the guarantee. The VENDOR shall be responsible to attend to and remedy such items within a reasonable amount of time. Appropriate logs, schedules and reports shall be maintained by VENDOR to reflect these items and their redress. Appropriate warranty information and/or catalogues of parts, instruction of use shall be provided with Proposal Form. If these items are not appropriate with Proposal form, they shall be provided when items are delivered.

13. MSD SHEETS

CONTRACTORS will be responsible to obtain or create a list of the hazardous chemicals and the Material Safety Data Sheets for the materials their contractor or employees are

using or delivering in the course of their work. Vendors shall supply such data to receiving department/office at time of delivery.

14. INDEMNIFICATION/HOLDHARMLESS

The CONTRACTOR shall at all times indemnify and save harmless the Town of Stratford and its officers, agents and employees on account of and from any and all claims, damages, losses, judgments, workers' compensation payments, litigation expenses and legal counsel fees arising out of injuries to persons (including death) or damage to property alleged to have been sustained by (a) officers, agents and employees of the Town of Stratford or (b) the CONTRACTOR, his subcontractors or material men or (c) any other person, which injuries are alleged to have occurred on or near the work or to have been caused in whole or in part by the acts, omissions or neglect of the CONTRACTOR or his subcontractor or material man or by reason of his or their use of faulty, defective or unsuitable materials, tools or equipment of defective design in constructing or in performing the work. The existence of insurance shall in no way limit the scope of this indemnification. The CONTRACTOR further undertakes to reimburse the Town of Stratford for damage to property of the Town of Stratford caused by the CONTRACTOR, or his employees, agents, subcontractors or material men or by faulty, defective or unsuitable material or equipment used by him or them.

The CONTRACTOR shall hold and save the TOWN and its officers, agents, and employees harmless from liability of any nature or kind, including cost and expenses for, or on account of any patented or unpatented invention, process article, or appliance manufactured or used in the performance of the contract, including its use by the TOWN unless otherwise specifically stipulated in this Proposal.

15. QUANTITIES

The quantities as listed are estimates. The TOWN is in no way obligated to purchase any set amount at any time, but will purchase as needs dictate. The estimates listed can be considered average purchases per year.

The TOWN reserves the right to increase or decrease the quantity of this Proposal at the same Proposal price stated on the Proposal form.

16. EVIDENCE OF ORDER

If notified of the acceptance of this proposal within the acceptance period of sixty (60) days, the VENDOR agrees to submit evidence of having ordered the vehicle, equipment or started project within five (5) working days of the "NOTICE TO PROCEED."

17. RIGHT OF THE OWNER TO TERMINATE CONTRACT

Failure of a CONTRACTOR to deliver within the time specified or to deliver within the time extended by the TOWN, and failure to make replacements of rejected articles when so requested, immediately or as directed by the TOWN shall constitute contract default.

In the event of default or that any of the provisions of this Contract are violated by the Vendor, or by any of his Subcontractors, the TOWN may serve written notice upon the VENDOR of his intention to terminate the Contract, such notices to contain the reasons for such intention to terminate the Contract, and unless within five (5) days after the serving of such notice upon the CONTRACTOR, such violation or delay shall cease and satisfactory arrangement of correction be made, the Contract shall, upon expiration of said five (5) days, cease and terminate. In the event of any such termination, the TOWN shall immediately serve notice thereof upon the Vendor.

If contract is terminated, the Town of Stratford reserves the right to award Proposal to next lowest responsible VENDOR or purchase on the open market. In either event, the defaulting CONTRACTOR (or his surety) shall be liable to the TOWN for cost to the TOWN in excess of the defaulted contract prices.

18. DELIVERY

Delivery of items or commencement of project shall be within 30 days of purchase order issuance or specified date scheduled in this document. The TOWN may establish blanket purchase orders under these specifications and require delivery on a monthly basis.

19. RISK OF LOSS

Vendors agree to bear all risk of loss; injury or destruction of goods and material ordered herein which occurs prior to acceptance. Such loss, injury or destruction shall not release the VENDOR from any obligation under this Proposal. Delivery shall be F.O.B.

20. PAYMENT

Invoices shall be furnished to the Department Head for verification and approval of the amount due the VENDOR. Final payment will not be made until final acceptance by the TOWN of Stratford of all vehicles, equipment, materials, or services. After Department Head approval/acceptance, payment shall be made within 30 days. Late payments will not be accepted until 45 days after approval/acceptance. Terms and conditions other than those noted above must be stated on Proposal.

21. INSURANCE REQUIREMENTS

The CONTRACTOR shall not commence work under the contract until he has obtained all insurance required under this article and the Town of Stratford has approved such insurance, nor shall the CONTRACTOR allow any subcontractor to commence work on his subcontract until all similar insurance required of the subcontractor has been so

obtained and approved. Certificates of such insurance shall be filed with the TOWN and shall be subject to the approval of the TOWN for adequacy of protection before the execution of the contract.

All policies relating to this contract shall be so written that the TOWN shall be notified of cancellation or change at least sixty (60) days prior to the effective date of such cancellation or change. An X indicates insurance requirements for this bid.

Certificates from the insurance carrier shall be filed in triplicate with the TOWN and shall state the limits of liability and the expiration date for each policy and type of coverage. The Town of Stratford shall be named as an additional insured. Renewal certificates covering the renewal of all policies expiring during the life of the contract shall be filed with the TOWN not less than (10) days before the expiration of such policies.

A. Commercial General Liability Insurance

The CONTRACTOR shall take out and maintain during the life of this contract, and for two years after expiration of this contract, Commercial General Liability Insurance whose forms and conditions shall be subject to the terms of this provision and approval of the TOWN. In addition, such insurance shall be primary over any collectible and valid insurance of the TOWN and insured with companies with a minimum Best's rating of A-IX. Such insurance shall contain, without limitation, the following endorsements and/or provisions: Broad form contractual liability covering oral and written contracts; aggregate limit of liability to apply on a per job basis; explosion, collapse and underground hazards; coverage for the CONTRACTOR or any subcontractor or by anyone directly or indirectly employed by either of them and the amounts of such insurance which shall be in the following minimum limits of coverage:

\$1,000,000 each occurrence bodily injury/property damage covering premises and operations liability
\$1,000,000 personal and advertising injury each occurrence
\$2,000,000 bodily injury/property damage aggregate limit
\$1,000,000 completed operations and products liability directly or indirectly employed by either of them and the amounts of such insurance which shall be in the following minimum limits of coverage:
\$1,000,000 each occurrence bodily injury/property damage covering premises and operations liability
\$1,000,000 personal and advertising injury each occurrence
\$2,000,000 bodily injury/property damage aggregate limit
\$1,000,000 completed operations and products liability

B. Commercial Automobile Insurance

The CONTRACTOR shall take out and maintain during the life of this contract, Commercial Automobile Insurance, which shall cover the operation of all motor vehicles, owned by the CONTRACTOR. Such insurance shall also cover the hired and non-owned

autos of the CONTRACTOR and insured with companies with a minimum Best's rating of A-IX and the amounts of such insurance shall be in the following minimum limits:

\$1,000,000 bodily injury/property damage each accident
\$1,000,000 hired and non-owned autos

C. Worker's Compensation and Employer's Liability Insurance

The CONTRACTOR shall take out and maintain during the life of this contract, Workers Compensation and Employers Liability Insurance for all of CONTRACTOR's employees, employed at the site and in case any work is sublet, the CONTRACTOR shall require the subcontractor similarly to provide such coverage for all employees of the latter unless such employees are covered by the protection of the CONTRACTOR.

\$100,000 each accident
\$100,000 disease each employee
\$500,000 disease policy limit

OR

"Certificate of Solvency" issued by Connecticut Workers' Compensation Commission for self-insurers.

D. Professional Errors and Omissions Insurance

The CONTRACTOR shall take out and maintain, if so required by Town of Stratford, during the life of this contract, and for two years after expiration of this contract, for Professional Errors and Omissions Insurance (i.e. architects, engineers, etc.):

\$1,000,000 per claim
\$2,000,000 aggregate limit

E. Commercial Umbrella Liability

The CONTRACTOR shall take out and maintain, if so required by the Town of Stratford, during the life of this contract, and for two years after expiration of this contract, Commercial Umbrella Liability Insurance whose forms and conditions shall be subject to the terms of this provision and approval of the TOWN. In addition, such insurance shall be primary over any collectible and valid insurance of the TOWN and insured with companies with a minimum Best's rating of A-IX. Such insurance shall contain, without limitation, a following form endorsement, which shall not diminish, restrict or exclude coverage provided by any primary underlying policies. The amounts of such insurance shall be in following minimum limits:

\$5,000,000 each occurrence
\$5,000,000 aggregate limit

F. Owners and Contractors Protective Liability Insurance

The CONTRACTOR shall purchase and maintain during the life of this contract an Owners and CONTRACTORS Protective Liability Policy in the name of the Town of Stratford and insured companies with a minimum Best's rating of A-IX and the amounts of such insurance shall be in the following minimum limits:

\$1,000,000 bodily injury/property damage each occurrence
\$2,000,000 bodily injury/property damage aggregate limit

If CONTRACTOR/VENDOR is underwritten on a claims-made basis, the retroactive date shall be prior to or coincident with the date of this Contract/Agreement, and the Certificate of Insurance shall state that the coverage is claims-made and also the retroactive date, if any. The CONTRACTOR shall maintain coverage for the duration of the contract and for two years following the completion of the contract.

A Purchase Order for work shall not be issued until the Finance Director has received the required Insurance Certificate (3 copies), which names the TOWN as an additional insured.

22. EQUAL OPPORTUNITY - AFFIRMATIVE ACTION

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

A signature on the form certifies that the Bidder is declaring that it does not discriminate on the basis of race, color, sex, national origin, age or disability, etc. per State and Federal Statutes.

23. PREVAILING WAGES

If this is a construction project, this contract may be subject to Connecticut General Statutes Sect. 31-53, as amended. Generally, the statute applies to new construction projects totaling \$400,000 and over, and repair or rehabilitation projects totaling \$100,000 and over. The statute imposed certain wage requirements and reporting requirements on CONTRACTORS and subcontractors, and carries serious penalties for violation of the law. The TOWN will provide the CONTRACTOR with the current prevailing wage schedule. As stated in the statute the CONTRACTOR will provide the TOWN with time records and certified payrolls of their employees and their subcontractors' employees who work on the project. For additional information refer to www.ctdol.state.ct.us.

24. NON-COLLUSIVE STATEMENT

All Vendors submitting a proposal shall be required to provide a signed non-collusive statement with the proposal on the form provided

25. FUNDING

Some or the entire contract may be funded by state, federal or other grant programs. The bidder is advised that such funding programs may include contractual provisions binding on CONTRACTORS and which may, for example, require audits or certifications under oath that the CONTRACTOR has not been debarred, suspended or excluded from any publicly funded project or programs.

A contract shall be deemed executory only to the extent that appropriations are available to each agency for specified purchases. The TOWN's extended obligation on these contracts, which envision extended funding, through successive fiscal periods shall be contingent upon actual appropriations for the following fiscal year.

26. PERFORMANCE BOND

If this project proposal for services is over \$50,000 then the CONTRACTOR will be required to submit a Performance Bond amounting to one hundred percent of the total amount of the bid. The CONTRACTOR, when awarded the contract must submit within 10 days of the proposal award, and before beginning the work or signing a contract, the Performance Bond. The Performance Bond shall be made out in favor of the Town of Stratford and executed by a surety company authorized to do business in the State of Connecticut. The Performance Bond may be furnished in the following manner: Performance Bond, Surety Bond or Certified Bank Check. The Performance Bond will be required as security by the successful bidder for faithful performance of his/her contract.

27. GRATUITIES

The TOWN may, by written notice to the CONTRACTOR, cancel the contract if it is found that gratuities, in the form of entertainment, gifts or otherwise, were offered or given by the CONTRACTOR or any agent or representative of the CONTRACTOR, to any officer or employee of the TOWN, amending, or the making of any determinations with respect to the performing of such contract. In the event the TOWN pursuant to this provision cancels this contract, the TOWN shall be entitled, in addition to any other rights and remedies, to recover or withhold from the CONTRACTOR the amount of the gratuity.

28. ENVIRONMENTAL CERTIFICATIONS

If the contract entails any exposure to a regulated material including but not limited to asbestos or lead, the bidder certifies that it and each of its subcontractors and their workers will be certified and trained under all OSHA and other relevant regulations for such work.

29. OSHA/FEDERAL REGULATIONS

CONTRACTORS are responsible to meet all OSHA/Federal requirements including but not limited to hearing protection, Hazardous material regulations, blood borne pathogen regulations, breathing apparatus regulations, confined space entry regulations, drug and alcohol testing for CDL drivers, etc.

30. CERTIFICATION

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, a valid Connecticut Revaluation Company Certificate pursuant to Section 12-2c of the Connecticut General Statutes.

31. BID

Each proposal submitted shall include a copy of the CONTRACTOR'S Revaluation Company Certificate and shall itemize the CONTRACTOR'S qualifications and experience. The CONTRACTOR shall submit a complete client list of municipalities to which it has rendered services during the last five (5) years and the nature of those services. The proposal shall also include a statement showing the number of years the CONTRACTOR has actually been engaged as a company, corporation, partnership, or individual specializing in municipal tax revaluation services.

32. CHANGES

The request for proposal will be incorporated into the contract awarded by the successful respondent. Therefore, any exceptions to the terms of the RFP must be noted in the response. Attachments to the response must be in addition to, not in lieu of, the provisions of the RFP. The proposal shall be in the same format as this RFP.

33. PERSONNEL

The CONTRACTOR shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of Federal and State governments. The Company shall adhere to all legislation related to employment procedures.

The TOWN will request and have the final decision as to the specific personnel that will be assigned to perform all tasks related to the Stratford Revaluation.

The ability of the CONTRACTOR to commit these people for the duration of the project will have a direct effect on the awarding of the contract. The TOWN will provide a list of personnel to each CONTRACTOR at the time the proposals are due. Qualifications of Personnel

All personnel assigned to this project shall be subject to the approval of the TOWN and shall be subject to removal from the project by the CONTRACTOR upon the written order of the TOWN.

The potential CONTRACTOR must identify all project staff and their specific responsibilities. A minimum number of workdays to be spent on the Stratford project for each employee must be identified. A listing of concurrent projects that the employees will be assigned to must be identified.

Proposals must identify a Project Manager, Field Appraisal Supervisor, Residential Appraisers, and a Commercial Appraiser (an individual can serve more than one roll). The TOWN must approve any changes to the CONTRACTOR'S staffing as outlined in their proposal. Any proposed new or replacement staff are subject to the approval of the TOWN.

1. Minimum Qualifications

a. Project Manager

The administration of this project shall be assigned by the CONTRACTOR to the Project Manager, who shall be certified by the State of Connecticut as a Revaluation Supervisor, and shall have not less than ten (10) years of practical appraisal experience in the appraisal field.

2. Background Check

All personnel will be subject to background checks by the Stratford Police Department.

3. Conflict of Interest

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

4. Dress Code

All personnel in the employ of the CONTRACTOR should wear appropriate business attire and maintain a professional demeanor in the field and in the office, subject to the approval of the TOWN.

II TECHNICAL SPECIFICATIONS

1. ASSESSMENT DATE

The completed appraisals, upon approval of the TOWN will serve as the basis for assessments effective on the Grand List of October 1, 2019. Notwithstanding the following dates mentioned in (1), all information on property record cards and computer database shall reflect actual information as of October 1, 2019.

a. Penalties

i. Failure to complete work

Failure by the CONTRACTOR to complete all work prior to the date specified herein, in a manner acceptable to the TOWN, shall be cause for a penalty payment by the CONTRACTOR. The penalty will be in the amount of five hundred dollars (\$500) per day beyond the completion dates for the work described below.

b. Purpose of Provision

It is the purpose of this provision to allow the TOWN to impose a per-day penalty if any of the work designated for completion on or before the above-mentioned dates has not been completed. The TOWN does not intend to seek an extension to complete its duties on the October 1, 2019 Grand List.

i. Penalty/Application

This penalty, if applied, shall be deducted from the contract price and be in addition to such other rights as the TOWN may have pursuant to the Contract. The TOWN shall have the right to use the funds withheld from each periodic payment to these CONTRACTOR specifications, to satisfy wholly or partially, this damages clause. Delays occasioned by war, strike, explosion, acts of God, or an order of the court or other public authority are excepted.

2. COMPLIANCE WITH STATUTES

a. Requirement to Conduct a Revaluation is Controlled by State Law

By submitting a proposal, CONTRACTOR expressly acknowledges that the town's duty to perform a revaluation derives from state statutes and that such statutes are continuously subject to reform, amendment or repeal as the State Legislature may deem appropriate. CONTRACTOR shall amend its proposal to conform same to any standard imposed by law upon CONTRACTOR or the TOWN.

b. Provisions for Cancellation or Postponement of Revaluation

CONTRACTOR further acknowledges that in the event that the legislature shall suspend, postpone, waive or otherwise pass legislation that may affect the TOWN's duty to conduct a revaluation, the TOWN may cancel the proposal process if not concluded, or if a proposal award has been made, may cancel, revoke, rescind and/or nullify any such proposal award without cost and without incurring liability to any respondent to this RFP, including any person to whom a proposal award is made.

c. Liquidated Damages

No proposal shall be accepted that does not contain a liquidated damages provision in limitation of damages or penalties payable by the TOWN in the event of cancellation, revocation, rescission or nullification of any proposal award as provided

for herein. The liquidated damages provision may provide for damages to be liquidated by formula or in a specified amount. The provision shall provide for the execution and delivery of a General Release substantially in the form attached hereto as Appendix F as a condition of TOWN's obligation to pay any damages.

3. **Town Data**

The Town of Stratford is contained within 17.6 square miles. The 2010 census indicated the town's population is 51,384. The last revaluation of the Town of Stratford was conducted for the October 1, 2009 Grand List. The TOWN's maps are updated frequently and the Town of Stratford is currently using a GIS mapping program using ESRI software. The approximate composition of the property types in the Town of Stratford is delineated in the following table:

<u>Total Parcel Count</u>	<u>19,865</u>
<u>Total Real Estate Grand List 2017 (Gross)</u>	<u>\$4,343,043,820</u>

Grand List Count By Use

Residential (single family, condo, 2-4 units)	18,053
Apartments (5units or more)	174
Commercial	681
Industrial	294
Vacant Land	578
Public Utility	8
Use Assessment	10
Exempt	351

4. **Completion Date and Time Schedule**

a. Changes and Subletting of Contract

i. Changes

Changes in these specifications to the contract will be permitted only upon written mutual agreement of the CONTRACTOR and the TOWN.

b. Subletting

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

c. Work Plan Schedule

The potential CONTRACTOR must submit a work plan that addresses the major tasks that must be performed for the successful completion of the revaluation program. This work plan must adhere to the deadlines that have been established in the following sections. The CONTRACTOR must identify the starting dates of each task and the resources (man-hours) that will be allocated for each work activity. The TOWN must agree upon the work plan time schedule.

d. Date and Time Schedule - Postponement of Contract

i. In the event that the State of Connecticut takes any action, the result of which is that the TOWN's duty to conduct a revaluation for the October 1, 2019 Grand List is suspended, postponed, waived or changed in any material respect, the TOWN may, at its option: i) cancel the revaluation and revoke, rescind or nullify the proposal award; and any contract resulting there from; or ii) modify the proposal award or contract arising there from on such terms and conditions as CONTRACTOR and the TOWN may mutually agree.

ii. In the event that the TOWN and the CONTRACTOR agree to earlier completion dates on any of the above items, appropriate adjustments to completion dates will be made to the remaining items.

5. Payment Schedule

Payments shall be made in the following manner that is proposed by the CONTRACTOR that is mutually agreeable to the TOWN but, no more frequently than monthly.

6. Public Information

Public information must be an important part of the revaluation PROJECT. Adequate public understanding of the revaluation program is essential to its success. The COMPANY will assist the TOWN with media releases and public relations. (All information and releases must have prior approval of the TOWN.)

7. Responsibility of the Town

A. NATURE OF SERVICE

It is clearly understood and agreed that the services rendered by the CONTRACTOR are in the nature of assistance to the TOWN, and all decisions as to proper valuations, tax or tax exempt status, shall rest with the ASSESSOR.

B. COOPERATION

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

C. ITEMS FURNISHED BY THE TOWN

The TOWN shall furnish the following to the CONTRACTOR :

i. Office Space

The TOWN will provide office space in Town Hall for the CONTRACTOR performing the revaluation if necessary.

ii. ASSESSOR Maps

The TOWN will provide access to its maps electronically through either the internet or Virtual Private Network (VPN).

iii. Zoning

The TOWN shall provide a current TOWN Planning & Zoning Regulation as well as Zoning Maps.

D. Property Transfers

The TOWN will maintain all transfers and property splits occurring after the initial creation of the revaluation database. The CONTRACTOR shall update the revaluation database as necessary.

E. Administrative File

At the commencement of the revaluation project, the TOWN will provide access to its database through VPN.

F. Existing Field Cards

The TOWN will allow the CONTRACTOR access to the existing digital field cards. The CONTRACTOR will be allowed to utilize the sketches, age built and other information contained on these records, at the discretion of the TOWN. The CONTRACTOR will make all copies of field cards needed during the revaluation project.

G. Income and Expense Forms

The Assessor shall make available to the CONTRACTOR all copies of the Income and Expense information received by the TOWN for the 2014, 2015, 2016, 2017 and 2018 fiscal years. All information filed and furnished with the M-58 forms shall not be public record and is not subject to the provisions of Section 1-200 (Freedom of Information) of the Connecticut General Statutes. If the TOWN chooses option 3, subsequent year documents will be provided.

8. SCOPE OF SERVICES AND OVERVIEW

The project is for the revaluation of all real estate within the corporate limits of the Town of Stratford, Connecticut, as of October 1, 2019, as described below:

- a. All taxable real estate, land, buildings and improvements
- b. All exempt real estate, land, buildings and improvements
- c. All public utility real estate, land, building and improvements

This revaluation project must be completed using a Computer Assisted Mass Appraisal system. The TOWN currently operates using Vision Government Solutions version 6.5. The TOWN will be seeking replacement software as part of this revaluation proposal as Vision 6.5 will no longer be supported. The replacement computer system and all data contained within this system will be the property of the Town of Stratford.

All work to be carried out in this project and all forms, materials, and supplies utilized in this project shall conform to and be executed in accordance with the requirements of the Secretary of the Office of Policy and Management and the *Connecticut General Statutes* pertaining hereto, and shall be subject to the direct supervision and approval of the ASSESSOR of the Town of Stratford, Connecticut.

The assessed value to be determined shall be seventy (70) percent of full fair market value as defined in Section 12-63 of the Connecticut General Statutes and shall be based on recognized methods of appraisal and conform to USPAP (Uniform Standards of Appraisal Practice), as required by Connecticut General Statutes for the licensing and certification of all individuals involved in the appraisal of real estate.

9. Valuation Approaches

All values used in the revaluation project must be developed in compliance with nationally recognized professional mass appraisal standards, including Standard 6 of the Uniform Standards of Professional Appraisal Practice (USPAP) as published by the Appraisal Standards Board. Any proposed modifications to the valuation schedules must be reviewed and analyzed with the ASSESSOR prior to generating the proposed values for field review.

a. Market Approach

The CONTRACTOR must describe in detail its particular methods for generating values with the market approach. Every parcel of real property should be valued by the market approach, with the exception of special use properties. The Comparative Sales Approach or a Statistical Modeling Approach is the two preferred techniques. If a statistical modeling approach is employed, the CONTRACTOR must specify the techniques employed and the types of property that will be valued with these techniques. If the direct sales comparison method is employed, the CONTRACTOR in its proposal must describe all adjustment techniques.

b. Sales verification

The validity of all residential sales in the TOWN for the period of April 1, 2017 through October 1, 2019, shall be determined by the CONTRACTOR and the TOWN. For vacant land, commercial/industrial, and special residential properties (i.e. waterfront) the CONTRACTOR and the TOWN will validate sales for the period of October 1, 2017 through October 1, 2019.

The TOWN will be verifying sales by mailing a sales questionnaire to the owners of the properties that have transferred in the above time frame. These forms will be made available to the CONTRACTOR.

Where comparable sales are not available from within the Town of Stratford, the CONTRACTOR should collect and verify sales information for income producing properties, vacant land and unique residential properties from comparable municipalities. This sales information will be used to support and defend the valuation of properties for which insufficient sales information within the Town of Stratford exists.

c. Cost Approach and Analysis

The CONTRACTOR shall derive a value for real property by estimating the current cost to replace or reproduce the existing structure, deducting for all accrued depreciation in the property, and adding the estimated land value. The CONTRACTOR shall develop cost schedules based on current costs of labor and materials prevailing in the TOWN during the year immediately preceding October 1, 2019 valuation date. Documentation supporting the determination of the cost schedule to be utilized in the revaluation must be submitted and approved by the TOWN.

The CONTRACTOR must market calibrate for the TOWN the replacement cost approach employed for the appropriate classes of property. All forms of depreciation (physical, functional, and economic) must be analyzed for the types of properties located in the TOWN. Physical depreciation must be determined by estimating the effective age of each property. Any additional adjustments for functional or economic obsolescence must then be made.

In calibrating accrued depreciation to local market conditions, and in estimating accrued depreciation, a report of the sales used in this determination, and the adjustments that were derived must be submitted to the TOWN for approval.

The CONTRACTOR shall develop and separately explain each depreciation amount listed on the property record card. Land values shall be added to the depreciated improvement values. The value determined as the depreciated replacement cost of each property shall be compared with the values determined by the income or sales comparison approaches to assist in the determination of obsolescence for property types and locations.

Depreciation schedules or methods to be used in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of buildings according to classification. These schedules or methods shall cover residential, commercial, industrial, farm and special use buildings, and must be approved by the TOWN. Cost schedules must be supported by a recognized valuation publication company such as Marshall & Swift, Means, etc.

d. Income Approach

The CONTRACTOR shall determine a value for income-producing property by converting anticipated income into a property value. The CONTRACTOR shall either capitalize a single year's income expectancies at a market-derived capitalization rate or a capitalization rate that reflects a specified income pattern, return on investment, and change in the value of investment, or discount the annual cash flows for the holding period and the reversion at a specified yield rate.

Typical income and expense ratios shall be developed by the CONTRACTOR by property type and shall be approved by the TOWN. Residential multi-family properties containing up to 6 units shall be valued using the gross rent multiplier (GRM) in accordance with §12-63b. The CONTRACTOR may utilize information contained in the income and expense statements obtained by the Assessor's Office to assist in their analysis.

e. Land Valuation

The land values will be derived from market sales occurring over the 2-year period prior to October 1, 2019, land residual analysis, and/or the extraction method. The land values will be set by the CONTRACTOR and approved by the TOWN. In the event any disagreement between the TOWN and the CONTRACTOR, the TOWN shall have the final decision confirming all land values and methods. **When applicable, both the full value and the P.A. 490 value shall be calculated by the CONTRACTOR.**

A complete land appraisal schedule must be developed for application to all types of land. Market derived adjustments must be developed for all factors influencing land value including size, location (including proximity to water), zoning and the presence of wetland conditions, topography, soil conditions, utilities, utility easements and power lines, non-conforming uses, vacancy, form of ownership, and zoning variances. Inspectors must visually inspect both improved and unimproved parcels to determine the effect of these conditions will have on the overall value of each parcel. Determination of these factors must be recorded in the inspector's notes at the time of inspection.

For areas where there are insufficient land sales, land value must be extracted from the sale price of improved properties, by deducting the depreciated cost of the improvement from the total sale price.

The CONTRACTOR shall prepare land unit values by front foot, square foot, acreage or fractional acreage; whichever in the judgment of the CONTRACTOR and TOWN most accurately reflects the market for the appraised land. Waterfront properties especially, must then be adjusted for depth, quality of water frontage and location. Basis for waterfront quality should be determined by analyzing view, beach, accessibility and docking amenities.

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

The CONTRACTOR shall prepare a written report summarizing its findings with respect to the values of the various categories of land, together with supporting statistical documentation in the form of comparable sales within an acceptable time period. Where comparable sales are not available from within the town, the CONTRACTOR shall use comparable sales from surrounding municipalities with the approval of the TOWN.

f. Neighborhood Delineation

After considering the environmental, economic, social characteristics of the Town, the CONTRACTOR shall, with the cooperation and approval of the TOWN, delineate "neighborhood" units within the Town. These neighborhoods will be determined by analysis of the market factors needed to select comparable sales for the sales approach to value. The CONTRACTOR may utilize existing neighborhood maps to assist in this process. Each neighborhood unit will, in the CONTRACTOR'S opinion, exhibit homogeneous characteristics.

Boundaries such as highways, natural, economic conditions, census tracts, and zoning etc. shall be considered. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. Each neighborhood code will be recorded and maintained on all property record cards and the computer database.

g. Valuation of Real Estate

The CONTRACTOR will calculate a value estimate for each parcel that will be comprised of land, building, outbuildings, and total value. The final value shall reflect 70% of fair market value as of October 1, 2019. The CONTRACTOR shall compute to the nearest 100 dollars (\$100.00) the value of all properties identified above.

h. Commercial/Industrial Properties

The market approach is the preferred valuation methodology for parcels in the residential category. The CAMA system as installed for the TOWN will contain proven techniques for developing market based estimates of value.

The CAMA System will present a summary of the cost approach for a subject and not less than 3 and up to 5 comparable sales, showing the basic inventory information for each. The comparable sales in the same market environment will not be merely similar properties, but will be the three to five most comparable sales in the entire sales file. This determination will be made by calculating a weighted measure of comparability based on the relative importance of each characteristic (location, size, age, style, grade, & conditions, etc.). The sales, which most closely resemble the subject, will then be selected as comparable.

Each individual selling price will then be adjusted to reflect differences in sales dates and physical characteristics to arrive at an adjusted selling price for each subject property.

The review appraiser can then choose this final market value estimate, the cost approach value or arrive at a separate value estimate based on the information available.

i. Commercial/Industrial Properties

All commercial, industrial, public utility and special purpose buildings shall have be classified, priced and reviewed as set forth in these specifications, the dimensions of all buildings shall also include the height, which shall be recorded on the property field card.

Income and expense data gathered by the TOWN shall be utilized and verified by the CONTRACTOR for income producing and where appropriate, owner-occupied properties. The CONTRACTOR, subject to the approval of the TOWN, will handle the analysis of this data. Any income and expense data, including OPM form number M-

58 with accompanying summary reports and rent schedules shall become property of the TOWN.

All information filed and furnished with the Income & Expense report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information) of the Connecticut General Statutes. The CONTRACTOR will be responsible for the review and interpolation of the income and expense data. 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 reflective of the Stratford market environment by investigating sales and income data. Rates shall be established for the various classes of property and checked with bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been checked by the TOWN, the CONTRACTOR shall perform the income approach using both actual and economic income and expenses.

The CAMA System will give the appraiser the ability to model the market place by physical characteristics, construction type, and actual use for income producing properties and apply the results of the models to individual commercial or industrial properties. The models are used to assign appropriate market rent and expense information that is keyed to the location of the property, the effective age of the improvement, and the allocation of building space for potential or actual use.

The review appraiser will be provided with a single review document which provides information regarding the physical characteristics of the property, the indicated cost approach value, and one or more approaches to value that have already been adjusted to reflect the location, age and condition of the subject property.

Each parcel will be valued by the CONTRACTOR's Senior Commercial Appraiser or appraiser with an MAI designation. The CONTRACTOR's Senior Commercial Appraiser or MAI designated appraiser and the TOWN will conduct final valuation review. CONTRACTOR will provide upon submission of bid, a detailed plan on the Senior Commercial Appraiser or MAI involvement in the valuation of commercial properties.

j. Field Review

Quality study/Pre-Review: Experienced CONTRACTOR staff will perform a full pre-review of data that has been collected by data collectors. During this step, adjustments to grade, depreciation and functional and/or economic adjustment factors may be made to better reflect market trends within the TOWN. Observed depreciation shall include physical depreciation, functional and economic obsolescence. Final depreciation will reflect the interior and exterior condition on all types of properties. The

TOWN'S staff will work closely with the company's reviewers to verify consistency of grades, depreciation, etc.

The CONTRACTOR shall be required to submit a detailed quality control program. The quality control must address the accuracy of the data being collected. This program must include a comprehensive reporting system and be approved by the TOWN.

k. Information

The CONTRACTOR shall give to the TOWN any and all information, including but not limited to, pricing schedules, hearing information, etc., pertaining to the revaluation work.

l. Transmittal of Records to the Assessor

The TOWN shall be allowed access to review all appraisals prior to and after completion. All appraisals of buildings either completed or under construction and all completed and corrected records shall be turned over to the TOWN by December 30, 2019 as specified in the schedule and agreed upon by the TOWN. All documentation employed in conjunction with this program, including software programs, shall become the property of the TOWN. The final inspection and review shall take into consideration any known or apparent changes in the individual property since it was first inspected in order that the final appraisal of property shall be made as of October 1, 2019. This information and/or appraisal or record shall not be made public until after the informal hearings, except to the extent that public access may be compulsory under the provisions of applicable law.

m. CERTIFICATION

It is understood and agreed that the Revaluation of properties covered by this contract shall 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), shall be acceptable to the TOWN and shall conform to the procedures and technical requirements of the TOWN. The CONTRACTOR shall meet bi-weekly with the TOWN to discuss the progress and various other details of the project. The ASSESSOR must certify that the values resulting from this project represent 70% of the fair market value pursuant to Section 12-63 of the Connecticut General Statutes.

III. PROPOSAL OPTIONS

Proposals shall include pricing for the following additional responsibilities:

1. **Option 1: Complete Revaluation with physical inspections of all parcels.**

a. **Property Inspections**

The CONTRACTOR shall perform physical inspections; both interior and exterior of all parcels located in the Town of Stratford. The inspections shall be in accordance with Connecticut General Statutes 10 year revaluation cycle. The last full physical inspections were performed for the 2009 revaluation.

b. **Building Permits**

The CONTRACTOR will do all inspections and update all properties that have been issued any building permits between October 1, 2018 and October 1, 2019.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

c. **Sales Verification inspections**

The CONTRACTOR will complete an interior and exterior inspection and measurement check of all sale properties to determine the correctness of the current physical listing at the time of the sale. These validated sales will be the basis for the comparable sales approach for all classes of property.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the Town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

d. **Signing of communications**

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

e. **Assessment Notices**

At the close of the revaluation, a notice shall be sent, at the CONTRACTOR'S expense (including envelope) by first class mail, to each property owner of record, setting forth the valuation that has been placed upon the property identified in the notice. The notice shall be prepared in duplicate, sent out by **November 7, 2019** and in conformity with the Connecticut General Statutes, as from time to time amended. Further enclosed with such notice shall be a letter specifying the dates, times, and places of the revaluation company hearings with an explanation as to the appeal process. Such notices shall be subject to approval by the TOWN. A duplicate copy of all letters sent shall be arranged in alphabetical order and left with the TOWN. Where applicable, a letter shall be enclosed to explain the benefits of and the effect on the new assessment for properties classified as FARM and FOREST. The TOWN, prior to its mailing, shall approve said letter

f. Revaluation Hearings

1. At a time mutually agreeable to the TOWN and the CONTRACTOR following completion of all review work by the TOWN and the CONTRACTOR, but not later than November 17, 2019, the CONTRACTOR shall hold hearings so that owners of property or their legal representatives may appear at specified times to discuss their new assessments with qualified members of the CONTRACTOR's staff. These hearings shall continue no longer than December 17, 2019. The CONTRACTOR shall provide a list of standards by which said hearings shall be conducted.

2. The CONTRACTOR, in conjunction with recommendations of the TOWN, shall schedule a sufficient number of hearings and provide sufficient personnel (a minimum of two) to handle said hearings expeditiously and fairly. The CONTRACTOR's personnel shall explain the manner and methods of arriving at value in the terms best understood by the public. Any information offered by the taxpayer or representative shall be given consideration, and adjustments shall be made where warranted.

3. The CONTRACTOR shall have an adequate number of days for the hearings, said hearings to include evenings and Saturdays. Every property owner shall have the opportunity to an informal hearing with the CONTRACTOR within said period of time agreed upon by the TOWN and the CONTRACTOR. The CONTRACTOR must inspect any property that appears to contain an error that impacts value based on information provided at the hearing. CONTRACTOR must re-inspection or field review of at least 5% of the properties that were involved with the informal hearings. Any property that did not have an interior inspection prior to the informal hearings must be inspected before any reduction in value is made. These properties will not be considered as part of the above mentioned 5% that must be re-inspected.

4. The CONTRACTOR must provide, at a minimum, the following information to the TOWN at the conclusion of the hearing:

- a. Total number of informal hearings
- b. Number of questions/problems resolved without changes
- c. Number of hearings requiring subsequent field review
- d. Number of value changes by property type

5. The CONTRACTOR shall mail a notice that reflects the result of the hearings at the CONTRACTOR'S expense. 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 approval by the TOWN.

6. A duplicate copy of such notice shall be submitted to the TOWN. The CONTRACTOR shall include with such notice, information as to how a property owner may appeal their assessment with the Board of Assessment Appeals per Sec. 12-55 of the Connecticut General Statutes.

g. Board of Assessment Appeals

The CONTRACTOR shall have the project supervisor available for a 2-hour Training session with the Board of Assessment Appeals prior to the Board's hearings on the 2019 Grand List.

The CONTRACTOR shall have a qualified member or members of its staff available for attendance at any deliberations of the Board of Assessment Appeals hearings to be held after the completion of the revaluation (Sundays excluded). This staff member will assist the Board by explaining the valuation procedure and the information contained in the property files. The staff members will be appropriately qualified for deliberations of residential or commercial properties. Such availability and attendance shall not be required after the date, including any permitted extension, for the completion of the duties of the Board of Assessment Appeals on the October 1, 2019 Grand List.

h. TOWN's Office Staff Training Program

The CONTRACTOR will be responsible for training local staff in such manner that at the end of the project the TOWN's Office will be knowledgeable in the operation of all phases of the valuation system. On-the-job training, where feasible, shall consist of the TOWN and the office staff working in the appropriate phases of this project under the CONTRACTOR'S supervision.

i. Valuation Review

The CONTRACTOR will field review all parcels after value generation. The CONTRACTOR is responsible for the review of value estimates for all real property parcels to verify that the application of the valuation methodology employed has resulted in the uniform and consistent valuation of comparable properties. The CONTRACTOR shall be required to submit final values by October 6, 2019 to the TOWN. The CONTRACTOR will record on the CAMA data file the source of the final appraisal value (cost, market, income, appraiser override, etc.) and the date the final review is made.

Individuals conducting this phase of the program must have valuation expertise, field review experience and knowledge of the valuation techniques employed in the TOWN as well as complete familiarity with the revaluation project. During review, if any valuation changes are made due to data error, the CONTRACTOR must correct the data on the property file. The TOWN shall be contacted by the CONTRACTOR and be reviewed by no more than two individuals.

The CONTRACTOR shall provide the TOWN with written procedures for the conduct of valuation field review at least ten (10) days prior to the scheduled date for the commencement of the valuation field review.

j. Date and Time Schedule

The following phases of the revaluation must be completed by the dates indicated below.

1. Complete preliminary residential land study by June 3, 2019. Values to be continually updated until October 1, 2019.
2. Complete commercial land study, study of market rents, expenses and capitalization factors by July 12, 2019.
3. Complete all preliminary building cost values by July 26, 2019.
4. Complete preliminary building cost manual by September 6, 2019
5. Complete the suggested values to the TOWN by October 11, 2019.
6. Submission of preliminary Performance Testing Standards no later than October 18, 2019.
7. TOWN completes review and final adjustments made for real estate property no later than October 24, 2019.

8. Submission of final Performance Testing Standards no later than December 20, 2019.

k. Software/Software Compatibility

The TOWN'S current operating system is Windows/SQL environment on the server side. The TOWN utilizes Windows 7 or Windows 10 environment on the desktop side. Both server and desktop environments are virtualized.

The TOWN'S current CAMA system is Vision Government Solutions version 6.5. This system will no longer be supported and therefore the TOWN seeks to replace the CAMA software.

The proposed software should contain at minimum the following capabilities but is not limited to such requirements:

1. Ability to sync or bridge to Quality Data Software.
2. Integrate with GIS/ESRI software.
3. Mobile application for use on Microsoft surface, tablet or IPAD with sketching capabilities.
4. Ability to host assessment with GIS maps on a public website.
5. Ability to sync or bridge to and from View Point Building Permit web based software.

The CONTRACTOR shall include the name of the system and the cost of the system. Fees in addition to the base software should be itemized, ie per seat license fees, GIS integration, mobile application, web hosting, annual licensing fees or any other costs for services you provide.

The CONTRACTOR shall, as a separate option, list the dollar amount which will be billed to the TOWN by the CONTRACTOR for the cost to convert the Town's current CAMA system (Vision 6.5) to the proposed new system the CONTRACTOR is recommending.

Server and client based software must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems.

All underlying third party software components must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems by the manufacturer.

All software components must be fully supported to run in a virtualized instance of the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems running in a VMware environment.

All software must be kept up to date and patched as necessary to fix vulnerabilities as patches or new versions become available.

2. Option 2: Complete Revaluation with physical inspections of all parcels, modified Contractor responsibilities

a. Property Inspections

The TOWN shall perform physical inspections; both interior and exterior of all parcels located in the Town of Stratford. The inspections shall be in accordance with Connecticut General Statutes 10 year revaluation cycle. The last full physical inspections were performed for the 2009 revaluation.

b. Building Permits

The TOWN will do all inspections and update all properties that have been issued any building permits between October 1, 2018 and October 1, 2019.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the Town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

c. Sales Verification inspections

The TOWN will do all inspections and update all properties that have sold between October 1, 2018 and October 1, 2019.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the Town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

d. Signing of communications

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

e. Assessment Notices

The TOWN shall sign, by the TOWN or TOWN designee, communications to be mailed at the town's expense, for the purpose of contacting a property owner for inspection of their property.

f. Revaluation Hearings

1. Upon completion of all review work by the TOWN and the CONTRACTOR, but not later than November 17, 2019, the TOWN shall hold hearings so that owners of property or their legal representatives may appear at specified times to discuss their new assessments with qualified members of the ASSESSMENT staff.

2. The TOWN must inspect any property that appears to contain an error that impacts value based on information provided at the hearing. Properties involved with the informal hearings process will be reviewed and or re-inspected where necessary. Any property that did not have an interior inspection prior to the informal hearings must be inspected before any reduction in value is made.

3. The CONTRACTOR and TOWN will review all data from the informal hearings and make any necessary changes to the valuation tables.

4. The CONTRACTOR shall mail the TOWN an electronic file in an appropriate format, of all properties that were revised since notices were last sent.

g. Board of Assessment Appeals

The TOWN will provide any necessary training to the Stratford Board of Assessment Appeals prior to the Board's hearings on the 2019 Grand List.

h. TOWN's Office Staff

The CONTRACTOR throughout the revaluation process shall work with the TOWN and provide any information necessary for the staff to complete review, inspections, informal hearings, data entry etc.

i. Valuation Review

The CONTRACTOR will work with the TOWN to establish written procedures for the conduct of valuation field review at least ten (10) days prior to the scheduled date for the commencement of the valuation field review.. The TOWN and CONTRACTOR shall field review parcels after value generation. The CONTRACTOR and the TOWN are responsible for the review of value estimates for all real property parcels to verify that the application of the valuation methodology employed has resulted in the uniform and consistent valuation of comparable properties.

The CONTRACTOR shall be required to submit final values by October 6, 2019 to the TOWN. The CONTRACTOR will record on the CAMA data file the source of the final appraisal value (cost, market, income, appraiser override, etc.) and the date the final review is made.

Individuals conducting this phase of the program must have valuation expertise, field review experience and knowledge of the valuation techniques employed in the TOWN as well as complete familiarity with the revaluation project. During review, if any valuation changes are made due to data error, the TOWN must correct the data on the property file.

j. Date and Time Schedule

The following phases of the revaluation must be completed by the dates indicated below.

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The proposed software should contain at minimum the following capabilities but is not limited to such requirements:

1. Ability to sync or bridge to Quality Data Software.
2. Integrate with GIS/ESRI software.
3. Mobile application for use on Microsoft surface, tablet or IPAD with sketching capabilities.
4. Ability to host assessment with GIS maps on a public website.
5. Ability to sync or bridge to and from View Point Building Permit web based software.

The CONTRACTOR shall include the name of the system and the cost of the system. Fees in addition to the base software should be itemized, ie per seat license fees, GIS integration, mobile application, web hosting, annual licensing fees or any other costs for services you provide.

The CONTRACTOR shall, as a separate option, list the dollar amount which will be billed to the TOWN by the CONTRACTOR for the cost to convert the Town's current CAMA system (Vision 6.5) to the proposed new system the CONTRACTOR is recommending.

Server and client based software must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems.

All underlying third party software components must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems by the manufacturer.

All software components must be fully supported to run in a virtualized instance of the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems running in a VMware environment.

All software must be kept up to date and patched as necessary to fix vulnerabilities as patches or new versions become available.

3. **Option 3: Complete Revaluation with physical inspections of all parcels with annual updates for grand list years 2020, 2021, 2022, and 2023.**

a. **Property Inspections**

The TOWN shall perform physical inspections; both interior and exterior of all parcels located in the Town of Stratford. The inspections shall be in accordance with Connecticut General Statutes 10 year revaluation cycle. The last full physical inspections were performed for the 2009 revaluation. The contractor may inspect any property with prior notice given to the TOWN.

b. **Building Permits**

The TOWN will do all inspections and update all properties that have been issued any building permits between October 1, 2018 and October 1, 2019.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the Town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

c. **Sales Verification inspections**

The TOWN will complete an interior and exterior inspection and measurement check of all sale properties to determine the correctness of the current physical listing at the time of the sale. These validated sales will be the basis for the comparable sales approach for all classes of property.

CONTRACTOR will be given access to the CAMA system. The TOWN will provide a terminal connection in the office for the revaluation CONTRACTOR. This CAMA system will be linked to the Town's administrative file. All required property characteristic information to be entered into the CAMA system is the responsibility of the CONTRACTOR.

d. **Signing of communications**

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

e. Assessment Notices

The TOWN shall sign, by the TOWN or Assessor designee, communications to be mailed at the town's expense, for the purpose of contacting a property owner for inspection of their property.

f. Revaluation Hearings

1. Upon completion of all review work by the TOWN and the CONTRACTOR, but not later than November 17, 2019, the TOWN shall hold hearings so that owners of property or their legal representatives may appear at specified times to discuss their new assessments with qualified members of the ASSESSMENT staff.

2. The TOWN must inspect any property that appears to contain an error that impacts value based on information provided at the hearing. Properties involved with the informal hearings process will be reviewed and or re-inspected where necessary. Any property that did not have an interior inspection prior to the informal hearings must be inspected before any reduction in value is made.

3. The CONTRACTOR and TOWN will review all data from the informal hearings and make any necessary changes to the valuation tables.

4. The CONTRACTOR shall mail the TOWN an electronic file in an appropriate format, of all properties that were revised since notices were last sent.

g. Board of Assessment Appeals

The TOWN will provide any necessary training to the Stratford Board of Assessment Appeals prior to the Board's hearings on the 2019 Grand List.

h. TOWN's Office Staff

The CONTRACTOR throughout the revaluation process shall work with the TOWN and provide any information necessary for the staff to complete review, inspections, informal hearings, data entry etc.

i. Valuation Review

The CONTRACTOR will work with the TOWN to establish written procedures for the conduct of valuation field review at least ten (10) days prior to the scheduled date for the commencement of the valuation field review.. The TOWN and CONTRACTOR shall field review parcels after value generation. The CONTRACTOR and the TOWN are responsible for the review of value estimates for all real property parcels to verify that the application of the valuation methodology employed has resulted in the uniform and consistent valuation of comparable properties.

The CONTRACTOR shall be required to submit final values by October 6, 2019 to the TOWN. The CONTRACTOR will record on the CAMA data file the source of the final appraisal value (cost, market, income, appraiser override, etc.) and the date the final review is made.

Individuals conducting this phase of the program must have valuation expertise, field review experience and knowledge of the valuation techniques employed in the TOWN as well as complete familiarity with the revaluation project. During review, if any valuation changes are made due to data error, the TOWN must correct the data on the property file.

j. Date and Time Schedule

The following phases of the revaluation must be completed by the dates indicated below.

1. Complete preliminary residential land study by June 3, 2019. Values to be continually updated until October 1, 2019.
2. Complete commercial land study, study of market rents, expenses and capitalization factors by July 12, 2019.
3. Complete all preliminary building cost values by July 26, 2019.
4. Complete preliminary building cost manual by September 6, 2019
5. Complete the suggested values to the TOWN by October 11, 2019.
6. Submission of preliminary Performance Testing Standards no later than October 18, 2019.
7. TOWN completes review and final adjustments made for real estate property no later than October 24, 2019.
8. Submission of final Performance Testing Standards no later than December 20, 2019.

Dates to be updated annually for subsequent year revaluations.

k. Software/Software Compatibility

The TOWN'S current operating system is Windows/SQL environment on the server side. The TOWN utilizes Windows 7 or Windows 10 environment on the desktop side. Both server and desktop environments are virtualized.

The TOWN'S current CAMA system is Vision Government Solutions version 6.5. This system will no longer be supported and therefore the TOWN seeks to replace the CAMA software.

The proposed software should contain at minimum the following capabilities but is not limited to such requirements:

1. Ability to sync or bridge to Quality Data Software.
2. Integrate with GIS/ESRI software.
3. Mobile application for use on Microsoft surface, tablet or IPAD with sketching capabilities.
4. Ability to host assessment with GIS maps on a public website.
5. Ability to sync or bridge to and from View Point Building Permit web based software.

The CONTRACTOR shall include the name of the system and the cost of the system. Fees in addition to the base software should be itemized, ie per seat license fees, GIS integration, mobile application, web hosting, annual licensing fees or any other costs for services you provide.

The CONTRACTOR shall, as a separate option, list the dollar amount which will be billed to the TOWN by the CONTRACTOR for the cost to convert the Town's current CAMA system (Vision 6.5) to the proposed new system the CONTRACTOR is recommending.

Server and client based software must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems.

All underlying third party software components must be fully supported to run on the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems by the manufacturer.

All software components must be fully supported to run in a virtualized instance of the newest generally available 64 bit versions of Microsoft Windows Server and Desktop operating systems running in a VMware environment.

All software must be kept up to date and patched as necessary to fix vulnerabilities as patches or new versions become available.

I. OPT OUT

The TOWN will have the opportunity to Opt-Out of the Field Review for any year. Should the TOWN elect to remove the field review from the scope; the TOWN will provide CONTRACTOR notice prior to the commencement of that Year project.

IV. Proposal Format and Contents

To assist vendors in successfully responding to the Request for Proposal, we have developed a proposal outline and several documents that must be completed and submitted with the proposal. Please format your responses as outlined below:

1. A letter of transmittal, including a Corporate Resolution, signed by the individual authorized to negotiate for and contractually bind the CONTRACTOR stating that the offer is effective for at least ninety (90) days from the deadline for the submission of proposal. Also include the name and telephone number of person(s) to be contacted for further information and clarification.
2. Copy of the firm's Financial Statement for the last two (2) fiscal years. The TOWN reserves the right to request additional financial information relative to the CONTRACTOR'S financial stability.
3. One page summary of the CONTRACTOR'S advantages and strengths.
4. Copy of the firm's current Connecticut Revaluation Certification.
5. Indication of years the firm has been engaged as a company, corporation, partnership, or individual specializing in municipal revaluation services.
6. A list of the Connecticut municipalities for which the CONTRACTOR has completed revaluation programs.
7. Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number, size of municipality, scope of services rendered and date completed.
8. A listing of all revaluations, now underway or under contract, telephone number, size of municipality, scope of services to be rendered, and date completed or to be completed.
9. Written assurances that the revaluation will meet the TOWN'S Certification Requirements.

10. Listing of personnel to be assigned to the Stratford revaluation project, including years of experience in current positions and other revaluation or appraisal positions, municipalities served, and their roles in those revaluations. Identify other projects each individual is currently assigned to and their anticipated completion date of that assignment. Resumes of personnel assigned shall also be included.
11. Create a work-plan that addresses the key tasks and respective completion dates outlined in this RFP. The work-plan should include each task, completion date and person responsible for completing the identified tasks.
12. Description of the methodologies used for assessing values for residential, commercial, industrial, condominium and vacant land parcels.
13. Description of sales analyses performed to verify accuracy of valuations.
14. Description of verification process for sales used in the sales analysis.

V. **PROPOSAL EVALUATION CRITERIA**

1. The criteria upon which proposals will be evaluated include, but not limited to, the following:
2. Directness of response to the specifications.
3. Experience and qualifications of the staff to be assigned to this particular project. It is preferable that an MAI designated appraiser be responsible for the valuation of all commercial properties.
4. Cost of the project will be considered, but will not be the sole basis for evaluation. CONTRACTORS must demonstrate that they are qualified and responsible as well.
5. Project timetable.
6. Range and completeness of the public information program.
7. The amount and method of calculating the liquidated damages for which the TOWN may become liable upon the cancellation, revocation, rescission or nullification of my proposal or award contract.

**TOWN OF STRATFORD
AFFIRMATIVE ACTION STATEMENT
CERTIFICATION OF VENDOR**

Concerning Equal Employment Opportunities and/or Affirmative Action Policy

The VENDOR certifies that it:

- 1) Is in compliance with the equal opportunity clause as set forth in the Connecticut State Law.
- 2) Does not maintain segregated facilities.
- 3) Has filed required employer's information reports.
- 4) Lists job openings with State Employment Services.
- 5) It is in compliance with the American with Disabilities Act.

Check Appropriate One:

- Yes/Vendor certifies to having an Affirmative Action Program.
 Not applicable/VENDOR employs 10 or less people.

Vendor-Company Name

Date

Name & Title (Printed)

Signature

TOWN OF STRATFORD
NON-COLLUSIVE STATEMENT

Proposal for: **Computer Assisted Mass Appraisal Software**

The undersigned VENDOR, having fully informed themselves regarding the accuracy of the statements made herein certifies that:

- a. The Proposal has been arrived at by the VENDOR independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with any other VENDOR of materials, supplies, equipment or services described in the Invitation for proposal designed to limit independent competition, and;
- b. The VENDOR has not communicated the contents of the Proposal to its employees or agents to any person not an employee or agent of the VENDOR or its surety on any bond furnished with the Proposal, and will not be communicated to any such person prior to the official opening of the Proposal.

The undersigned VENDOR further certifies that this statement is executed for the purpose of inducing the Town of Stratford to consider the Proposal and make an award in accordance therewith.

Please complete & sign

Legal Name of Vendor	
Business Address	
Name & Title of Authorize agent	
Signature	
Date	
Phone # & Fax #	

Town of Stratford

Proposal Form

Proposal Number:		Issued: August 31, 2018	
Date & Time of Proposal Opening:	October 1, 2019 at 3:00pm		
Location of Proposal Opening	Stratford Town Hall, Purchasing Department Main Street, Stratford CT 06615		2725
The undersigned submits the following Proposal in accordance with and in conformity with the enclosed Proposal documents as attached herewith.			
Task	Option 1	Option 2	Option 3
Development of Land, Residential and Commercial Valuation			
Residential Inspections			
Residential Data Entry			
Residential Field Review			
Commercial/Industrial Physical Inspections			
Commercial/Industrial Data Entry			
Commercial/Industrial Field Review			
Residential/Commercial/Industrial Building Permits Inspections			
Residential/Commercial/Industrial and Land Sales Verification Inspections			
Preparation of Communications			
Assesment Notices			
Revaluation Hearings			
Board of Assessment Appeals			
Assessment Staff Training			
Software Conversion from Vision 6.5			
Base Software Costs			
Additions to base software			
Total Cost Of Revaluation			

Task	Optional 3 Grand List 2019	Optional 3 Grand List 2020	Optional 3 Grand List 2021	Optional 3 Grand List 2022	Optional 3 Grand List 2023
Development of Land, Residential and Commercial Valuation					
Residential Inspections					
Residential Data Entry					
Residential Field Review					
Commercial/Industrial Physical Inspections					
Commercial/Industrial Data Entry					
Commercial/Industrial Field Review					
Residential/Commerical/Industrial Building Permits Inspections					
Residential/Commerical/Industrial and Land Sales Verification Inspections					
Preparation of Communications					
Assesment Notices					
Revaluation Hearings					
Board of Assessment Appeals					
Assessment Staff Training					
Software Conversion from Vision 6.5					
Base Software Costs					
Additions to base software					
Total Cost Of Revaluation					
Please Complete and Sign					
Legal Name of Vendor					
Business Address					
Name & Title of Authorized Agent					
Signature					