

# **TOWN OF PUTNAM, CONNECTICUT**

## **REQUEST FOR PROPOSALS**

### **REAPPRAISAL AND REVALUATION OF ALL REAL PROPERTY**

**FOR THE OCTOBER 1, 2024 GRAND LIST**



**DATE ISSUED: JUNE 26, 2023**

**DATE DUE: JULY 20, 2023**

**RACHEL FERREIRA, ASSESSOR  
ELAINE SISTARE, TOWN ADMINISTRATOR  
200 SCHOOL ST  
PUTNAM, CONNECTICUT 06260**

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**REQUEST FOR PROPOSAL (RFP)**

**PROJECT: THE COMPLETE REAPPRAISAL AND REVALUATION OF ALL REAL PROPERTY, TAXABLE AND EXEMPT, LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF PUTNAM, CONNECTICUT, EFFECTIVE OCTOBER 1, 2024.**

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

Elaine Sistare, Town Administrator  
200 School Street  
Putnam, Connecticut 06260

Until Thursday July 20th, 2023, at 2:00 PM when and where the PROPOSALS will be opened in Conference Room 101 and read aloud.

Any PROPOSALS received after said date and time, whether hand-delivered, submitted via US Postal Service, or submitted via any other delivery service, shall be declared invalid.

All PROPOSALS must include the enclosed and completed PROPOSAL FORM FOR 2024 REVALUATION (pages 5 - 7) and be placed in a sealed envelope. The sealed envelope shall be plainly marked "**PROPOSAL FOR 2024 REAPPRAISAL AND REVALUATION.**" In the sealed envelope all interested parties shall deliver two (2) copies of their PROPOSAL along with one (1) USB drive of the PROPOSAL.

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

A pre-proposal meeting will be held for all prospective parties on Thursday July 13th, 2023, at 10:00 a.m. in the **Putnam Town Hall, 200 School Street, Putnam, CT, in Conference Room 101.** The Town will accept questions or requests for clarification regarding this RFP but only in writing. Prospective respondents must email their questions to [rachel.ferreira@putnamct.us](mailto:rachel.ferreira@putnamct.us). Questions/requests for clarification must be received by the Assessor no later than July 10th, 2023. Written responses to the questions/requests for clarification will be mailed to prospective parties as deemed appropriate by the Town of Putnam.

All PROPOSALS must conform to the PROPOSAL Format and Contents. TOWN OF PUTNAM, at its discretion, may reject any incomplete or non-conforming PROPOSAL or PROPOSALS that contain any material misrepresentation.

**REQUEST FOR PROPOSAL(RFP)** (Continued)

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

The TOWN OF PUTNAM reserves the right to amend or cancel this REQUEST FOR PROPOSAL, at any time if it is in the best interest of the TOWN OF PUTNAM. The TOWN OF PUTNAM 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 TOWN OF PUTNAM and the ASSESSOR deem to be in the best interest of the TOWN OF PUTNAM, whether or not it is the lowest dollar PROPOSAL. The TOWN OF PUTNAM reserves the right to interview any, all or none of the PROPOSERS as part of its selection process.

Under this PROPOSAL, the PROPOSER would provide the services described in the CONTRACT and its accompanying Reappraisal and Revaluation Contract Specifications. The PROPOSAL must remain effective until September 29th, 2023. The CONTRACT will be awarded by that date if it is to be awarded.

**REQUEST FOR PROPOSAL PROCESS SCHEDULE**

<b>EVENT</b>	<b>DAY/DATE</b>	<b>TIME</b>
Request for Proposal Issued	June 26, 2023	N/A
Pre-Proposal Meeting	July 13, 2023	10:00 AM
Receipt of Sealed Proposals	July 20, 2023	2:00 PM
Proposal Remains Effective to	September 29, 2023	N/A

### **PROPOSAL FORMAT AND CONTENTS**

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

1. PROPOSALS shall be submitted on the appropriate form provided and signed by an authorized agent of the PROPOSER (See page 6).
2. Name, telephone number, FAX number, and e-mail address of person(s) to be contacted for further information and clarification (See page 6).
3. Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number, email address, parcel count, size of municipality, scope of services rendered, and date completed.
4. Listing of all municipal revaluations, now underway or under contract, including client contact, telephone number, email address, parcel count, size of municipality, scope of services to be rendered, and date to be completed and personnel active on each project.
5. Listing of personnel to be assigned to the TOWN OF PUTNAM revaluation, including years of experience in current positions and other revaluation positions, municipalities served, and their roles in those revaluations. Copy of employee's current Connecticut Revaluation Employee Certification and resumes of personnel assigned shall also be included.
6. Description of the methodologies to be used for assessing values for residential, commercial, industrial, and vacant land parcels.
7. Description of sales analyses to be performed to verify accuracy of valuations.
8. Listing of municipalities where you have performed revaluations utilizing Vision Government Solutions CAMA software and include within the proposal any cost to have a professional relationship with Vision Government Solutions throughout this project.
9. Description and outline summary of the proposed public relations program that would be used during the revaluation.
10. Copy of the PROPOSER'S current Connecticut Revaluation Certification.
11. Indication of how many years the firm has been engaged as a company, corporation, partnership, or individual specializing in municipal revaluation services.
12. Copy of the PROPOSER'S Financial Statement for the last two (2) fiscal years.
13. Copy of the PROPOSER'S existing certificate of insurance.
14. The PROPOSER must submit, as part of the PROPOSAL Form, a schedule and percentage of completed work based upon experiences of the PROPOSER, in performing revaluations, and based upon, the contract's specifications, as set forth in the CONTRACT SPECIFICATIONS on the enclosed form.
15. The PROPOSER must submit a Bid Bond or Certified Check for five percent (5%) of the proposal submitted.

16. The PROPOSER must quote the project as outlined in the CONTRACT and CONTRACT SPECIFICATIONS.

\*If PROPOSER is a corporation or LLC attach letter of authorization for signatory to sign and bind a CONTRACT and a Certificate of Good Standing from the Secretary of the State of incorporation.

**PROPOSAL FORM FOR 2024 REVALUATION**

**PROJECT: THE COMPLETE REAPPRAISAL AND REVALUATION OF REAL PROPERTY, TAXABLE AND EXEMPT, LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF PUTNAM, CONNECTICUT, EFFECTIVE OCTOBER 1, 2024.**

The undersigned, duly authorized agent for the individual, partnership, corporation, or other entity (hereinafter called PROPOSER) submitting this PROPOSAL affirms and declares:

1. That this PROPOSAL is executed by said PROPOSER with full knowledge and acceptance of the CONTRACT (including the Reappraisal and Revaluation Specifications) enclosed with the REQUEST FOR PROPOSAL (RFP) on the subject project.
2. That should this PROPOSAL be accepted in writing by the TOWN of PUTNAM, Connecticut (hereinafter called TOWN), said PROPOSER would furnish the services for which this PROPOSAL is submitted at the dollar amount indicated and in compliance with the provisions of said CONTRACT and CONTRACT SPECIFICATIONS.
3. That the PROPOSER or their representative has visited the TOWN; is familiar with its geography, general character of housing and its commercial and industrial areas; has examined the quality and condition of the ASSESSOR'S OFFICE records; and has met with the ASSESSOR to make themselves knowledgeable of those matters and conditions in the TOWN which would influence this PROPOSAL.
4. That all items, documents, and information required to accompany this PROPOSAL of the aforesaid PROPOSAL FORMAT AND CONTENTS are enclosed herewith.
5. That the PROPOSER proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid PROPOSAL SPECIFICATIONS.
7. The proposed scheduled prices for PROPOSALS are valid for ninety (90) days.
8. The TOWN reserves the right to reject any, or any part of, or all PROPOSALS; to waive informalities and technicalities; and to accept that PROPOSAL which the TOWN and the ASSESSOR deem to be in the best interest of the TOWN, whether it is the lowest dollar PROPOSAL.
9. Consideration in the awarding of the CONTRACT will be given, but not limited to: price, the accuracy and responsiveness of the PROPOSER, the experience, competence and financial condition of the PROPOSER, time for completion and/or labor force adequate to perform the work, the nature and size of the PROPOSER'S organization, quality of similar projects it has performed and completed in the past in Connecticut, other projects and/or revaluations currently under contract by the PROPOSER, and a determination by the TOWN that the PROPOSER has the ability to complete the revaluation successfully.
10. Payment schedule for percentage of completed work. This schedule is to be completed by the PROPOSER.

Stages of Completion	Percentage of Total Project Cost	Amount Associated
a. Bonding and Project Start-Up	_____ %	\$ _____
b. Data Mailers	_____ %	\$ _____
c. Data Collection & Verification – Residential	_____ %	\$ _____
d. Data Collection & Verification – Commercial/Industrial/Exempt	_____ %	\$ _____
e. Valuation Analysis - Land Study	_____ %	\$ _____
f. Valuation Analysis – Building Cost	_____ %	\$ _____
g. Valuation Analysis – Income and Expense Statements	_____ %	\$ _____
h. Field Review – Residential	_____ %	\$ _____
i. Field Review – Commercial/Industrial/Exempt	_____ %	\$ _____
j. Final Valuations; - Residential	_____ %	\$ _____
k. Final Valuations; Commercial/Industrial/Exempt	_____ %	\$ _____
l. Final Valuations: Properties that have changed since final values including properties with building permits	_____ %	\$ _____
m. Assessment Notices mailed	_____ %	\$ _____
n. Informal Hearings completed and final adjustments	_____ %	\$ _____
o. Board of Assessment Appeals completion of duties	_____ %	\$ _____
p. Litigation	_____ %	\$ _____
TOTAL	100%	\$ _____

**Please type or print**

FIRM NAME OF PROPOSER _____	CONTACT PERSON _____
TYPE OF LEGAL ENTITY _____	TELEPHONE NUMBER _____
BY SIGNATURE _____	FAX NUMBER _____
TITLE _____	E-MAIL _____

\* If PROPOSER is a corporation or LLC attach letter of authorization for signatory to sign and bind a contract and a Certificate of Good Standing from the Secretary of the State of incorporation.



## PROPOSAL CHECKLIST

All the following items **MUST** be included with the PROPOSALS. See CONTRACT SPECIFICATIONS for a complete description of the required items. Each item must be clearly identified and listed.

- ❑ Item #3 Listing of all municipal revaluations performed during the past 5 years.
- ❑ Item #4 Listing of all municipal revaluations, now underway or under contract.
- ❑ Item #5 Listing of personnel to be assigned to TOWN'S revaluation.
- ❑ Item #6 Description of the methodologies to be used for assessing values for residential, commercial, industrial, and vacant land parcels.
- ❑ Item #7 Description of sales analyses to be performed to verify accuracy of valuations.
- ❑ Item #8 Listing of municipal revaluations where PROPOSER has used Vision CAMA software.
- ❑ Item #9 Description and outline summary of the proposed public relations program.
- ❑ Item #10 Copy of the PROPOSER'S current Connecticut Revaluation Certification.
- ❑ Item #11 Indication of how many years the PROPOSER has been engaged as a company, corporation, partnership, or individual specializing in municipal revaluation services.
- ❑ Item #12 Copy of the PROPOSER'S Financial Statement for the last two (2) fiscal years.
- ❑ Item #13 Copy of PROPOSER'S existing insurance certificate.
- ❑ Item #14 A schedule and percentage of completed work based upon experiences of the PROPOSER, in performing revaluations, and based upon, the PROPOSER'S specifications, as set forth in the CONTRACT SPECIFICATIONS on the enclosed form.
- ❑ Item #15 Bid Bond or Certified Check for five percent (5%) of the proposal submitted.

**CONTRACT**

**THE COMPLETE REAPPRAISAL AND  
REVALUATION OF TAXABLE AND EXEMPT REAL PROPERTY  
LOCATED WITHIN THE CORPORATE LIMITS OF  
THE TOWN OF PUTNAM, CONNECTICUT  
EFFECTIVE OCTOBER 1, 2024**

This agreement made this \_\_\_\_ day of \_\_\_\_\_ 2023, by and between the TOWN of PUTNAM, a municipal corporation, located in the County of Windham, State of Connecticut, hereinafter termed the TOWN, acting by and through its Mayor, having been so duly authorized, and \_\_\_\_\_ hereinafter termed the CONTRACTOR.

WITNESSETH THAT:

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

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

WHEREAS The TOWN is relying on such representations in agreeing to enter into this CONTRACT,

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

1. ENGAGEMENT OF CONTRACTOR

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

2. COMMENCEMENT AND COMPLETION DATES

- A. The CONTRACTOR agrees to commence the work on or before September 18th, 2023.
- B. The CONTRACTOR agrees to complete the work through the informal public hearings on or before Saturday, December 13, 2024.
- C. The CONTRACTOR agrees to adhere to the Time Schedule for the revaluation project as set forth in the CONTRACT SPECIFICATIONS

### 3. COMPENSATION

The Town agrees to pay the CONTRACTOR the total sum of \$ \_\_\_\_\_ as compensation for the CONTRACTOR'S services to be performed and the records, materials, forms and supplies to be furnished by the CONTRACTOR. The CONTRACTOR and the TOWN agree that the methods of billing and payments shall be set forth in the CONTRACT SPECIFICATION.

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

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

Nothing contained in this CONTRACT or CONTRACT SPECIFICATIONS shall be deemed to create any contractual relationship between any subcontractor and the TOWN.

### 5. INDEMNIFICATION AND CONDITIONS

- A. The CONTRACTOR is an independent contractor and, as such, is not and shall not be construed to be an agent or employee of the TOWN of PUTNAM. The CONTRACTOR further agrees to indemnify, hold harmless and defend the TOWN at the CONTRACTOR'S expense from and against any and all liability for loss, damage or expense for which it may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the operations to be performed under this CONTRACT, or costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of this Contract.
- B. Upon execution of this contract, and thereafter no less than fifteen (15) days prior to the expiration date of any insurance policy delivered pursuant to this contract, the CONTRACTOR shall deliver to the TOWN a certificate(s) of insurance to show compliance with Section I.C.2 of the Contract Specifications.
- C. Each policy of insurance shall be issued by financially responsible insurers duly licensed to do business in the State of Connecticut. The insurers shall be acceptable to the TOWN and shall have an A.M. Best Company rating of "A/VII" or better. (OR ACCEPEABLE TO THE TOWN)
- D. Each policy of insurance shall include a waiver of subrogation in favor of the TOWN and shall provide no less than thirty (30) days' notice to the TOWN in the event of a cancellation or change in conditions or amounts of coverage.
- E. The CONTRACTOR will promptly notify the TOWN of any claim or case formally brought against the CONTRACTOR within thirty (30) days of such filing.

6. MISREPRESENTATION OR DEFAULT

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

7. CANCELLATION

If the CONTRACTOR does not pay its debts as they shall become due, or if a receiver shall be appointed for its business or its assets and not voided within sixty (60) days, or if the CONTRACTOR shall make an assignment for the benefit of creditors, or otherwise, or if 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 right here under to terminate the Contract and withhold any payments due.

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

8. CONTRACT SPECIFICATIONS

The CONTRACT SPECIFICATIONS consists of all the documents included herein. All the documents form the CONTRACT between the parties and are as fully a part of the CONTRACT as if attached to this Agreement or repeated herein. The Contract is the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. An enumeration of the CONTRACT SPECIFICATIONS, other than modifications subsequent to this agreement, are:

- a. This CONTRACT as executed by the parties; and
- b. The REQUEST FOR PROPOSAL, PROPOSAL FORMAT AND CONTENTS, PROPOSAL FORM FOR THE 2024 REVALUATION, APPENDIX A, general conditions, specifications, and
- c. The PROPOSAL submitted by the Contractor.

## APPENDIX A

### CONTRACT SPECIFICATIONS

#### DEFINITIONS

**ASSESSOR** The word “ASSESSOR” shall mean the duly appointed Assessor of the TOWN of PUTNAM, Connecticut.

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

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

**PROJECT** The word “PROJECT” shall mean the revaluation and reappraisal of all taxable and tax-exempt real property within the corporate limits of the TOWN of PUTNAM, Connecticut.

**CONTRACTOR** The word “CONTRACTOR” shall mean any person, firm, corporation, association, or other entity.

**TOWN** The word “TOWN” shall mean the TOWN of PUTNAM, Connecticut.

#### SCOPE OF REAPPRAISAL AND REVALUATION

This project includes the complete reappraisal and revaluation of all real estate within the corporate limits of the TOWN of PUTNAM, Connecticut effective as of October 1, 2024.

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

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

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

The Revaluation Project will cover and include all taxable real property, all tax-exempt real estate (land, buildings, and improvements) and all public utility and buildings in the TOWN.

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, shall be acceptable to the ASSESSOR and shall conform to the procedures and technical requirements of the ASSESSOR.

**EFFECTIVE DATE**

The effective date of this revaluation PROJECT shall be for October 1, 2024, Grand List and the pricing and valuation by the CONTRACTOR of all land, buildings, and property under this CONTRACT shall reflect the fair market value as of October 1, 2024.

**TOWN DATA**

Current Basis of Assessment	70%
Date of Last Revaluation	October 1, 2019
Population	9,224
Area of the Town	20.4 square miles
Number of Special Districts	3
Admin/Tax Billing System	Quality Data
CAMA system	Vision 8

The Contractor shall value all newly constructed improvements as of October 1, 2024 (as per §12-53a) and all other improvements in place as of October 1, 2024, or those incomplete as of this valuation date, and these parcels shall be included in the contract price and valued in accordance with §12-63 of the Connecticut General Statutes, and as provided hereinafter.

Below are the classifications and counts of taxable and tax-exempt real estate, which existed on the Town of Putnam's Grand List as of October 1, 2022. See Appendix B for more details concerning property classifications.

**Approximate Number of Accounts**

**October 1, 2022 Grand List**

<b>Property Type</b>	<b>Total Number of Accounts</b>
<b>Residential</b>	<b>2,898</b>
<b>Commercial</b>	<b>235</b>
<b>Industrial</b>	<b>60</b>
<b>Public Utility</b>	<b>7</b>
<b>Vacant Land</b>	<b>345</b>
<b>Use Assessment</b>	<b>195</b>
<b>Apartments</b>	<b>27</b>
<b>Tax Exempt</b>	<b>172</b>
<b>See APPENDIX B</b>	

I. GENERAL CONDITIONS

A. CONTRACTOR

Each company, corporation, partnership, or individual, hereinafter termed CONTRACTOR must hold from the time of submission of the PROPOSAL through the completion of all work hereinafter required, a valid Connecticut Revaluation Company Certification pursuant to Section 12-2c of the Connecticut General Statutes.

B. PERSONNEL

The CONTRACTOR shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of Federal and State governments. The CONTRACTOR shall submit to the TOWN, written qualifications and copies of Connecticut Revaluation Employee Certifications as well as a copy of a valid driver's license for all personnel assigned to this project.

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

1. Minimal Qualifications

a. Project Manager or Supervisor

The administration of this project shall be assigned by the CONTRACTOR to a project manager or supervisor, who shall be Certified by the State of Connecticut as a Revaluation Supervisor pursuant to Section 12-2b of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time, and shall have not less than ten (10) years of practical appraisal experience in the appraisal of commercial, industrial, apartment, and residential type properties. The project manager or supervisor shall be subject to approval by the ASSESSOR.

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

b. Reviewers and Appraisers

There shall be only one (1) Residential Review Appraiser who will perform the final field review for the entire town. The Review Appraiser shall have not less than five (5) years of practical residential appraisal experience. Three (3) years of this experience shall have been in the mass appraisal field and shall have occurred within the past five (5) years.

There shall be only one (1) Commercial Review Appraiser who will perform the final field review for the entire town. The Commercial Appraiser shall have not less than fifteen (15) years of practical appraisal experience, of which at least ten (10) years have been in the valuation of commercial, industrial and apartments. They must have a minimum of five (5) years of experience in mass appraisal in which they were responsible for the valuation of commercial, industrial, public utility, exempt, and apartments.

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program pursuant to Section 12-2b of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time.

All reviewers and appraisers shall be subject to the approval of the ASSESSOR prior to the commencement of their duties on this project.

c. Data Collectors Data Collectors shall have a high school diploma or equivalency and at least two (2) years' experience in the appraisal or municipal revaluation field. Any field person who does not meet the above qualifications must work under the direct supervision of an appraiser or project supervisor. The ASSESSOR shall be notified of the individual's name, starting date, qualifications, and field assignments prior to the commencement of the individual's duties on this project. All Data Collectors shall be subject to the approval of the ASSESSOR prior to the commencement of their duties on this project.

2. Identification

All field personnel shall have visible and clip-on identification cards that shall include an up-to-date photograph, supplied by the CONTRACTOR, and signed by the TOWN'S Assessor. In addition, all field personnel shall carry a "letter of Introduction" signed by the ASSESSOR. All personnel may be subject to finger printing and background checks by the Connecticut State Police.

All automobiles used by CONTRACTOR'S personnel shall be registered with the Connecticut State Police and the Putnam Police Department providing license plate number, make, model, year, and color of all vehicles used on this PROJECT. The TOWN shall provide the same information to be listed on the TOWN's website.

3. Conflict of Interest

The CONTRACTOR without the prior approval of the ASSESSOR shall employ no resident of the TOWN or TOWN employee.

C. PROTECTION OF THE TOWN

1. Bonding

The CONTRACTOR shall, to secure the faithful performance by the CONTRACTOR of the terms of this agreement, furnish to the TOWN, a Performance Surety Bond in the amount of this contract, which bond shall be issued by an admitted bonding company licensed to do such business in the State of Connecticut with a minimum A.M. Best Company rating of "A/VII." Said bond shall be delivered to the TOWN 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% 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 has been approved by the ASSESSOR and after the completion of the duties of the Board of Assessment Appeals. The reduced amount of the bond shall remain effective until a final resolution in the courts of any timely appeals taken from the decisions of the Board of Assessment Appeals on the Grand List of October 1, 2024.

2. Insurance

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

a. Workers' Compensation insurance:

- Coverage for all employees in accordance with Connecticut requirements

b. General Liability:

- Bodily Injury Liability \$1,000,000 per occurrence



- Property Damage Liability \$2,000,000 per occurrence (or combined single limit) \$5,000,000 per occurrence
- \$1,000,000 / \$2,000,000 aggregate

**The TOWN must be named as an Additional Insured party on a primary, non-contributory basis on the policy.**

c. Excess / Umbrella

- \$5,000,000

**The TOWN must be named as an Additional Insured party on a primary, non-contributory basis on the policy.**

d. Automobile liability insurance shall be written with a Comprehensive Form and include coverage for owned, hired, and non-owned vehicles.

- Bodily Injury Liability \$1,000,000 per occurrence
- Property Damage Liability \$2,000,000 per occurrence (or combined single limit) \$5,000,000 per occurrence

**The TOWN must be named as an Additional Insured party on a primary, non-contributory basis on the policy.**

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

3. Liquidated Damages

- a. Failure by the CONTRACTOR to complete all work prior to the date specified herein, November 15, 2024, shall be cause for a penalty payment by the CONTRACTOR on request of the ASSESSOR in the amount of TWO HUNDRED FIFTY DOLLARS (\$250.00) per day beyond the specified date of completion. For the purposes of this penalty only, completion of all work not later than November 15, 2024, is defined as follows:
- i. Completed CAMA database, integration of CAMA software with administrative software, property record cards with all measurements, listings, sketches, pricing, review, and final valuations.
  - ii. Assessment change notices mailed to comply with requirements of Connecticut State Statutes.
- b. Liquidated Damages due under this Contract shall be deducted from the contract price and will represent a fair and equitable estimate of the damages the TOWN will suffer if the CONTRACTOR'S work is not completed by November 14, 2024. The TOWN shall have the right to use the funds withheld from each periodic payment set forth in these CONTRACT SPECIFICATIONS, to satisfy in whole or in part, this liquidated damages clause. Delays occasioned by war, strike, explosion, or acts of God or an order of court or other public authority are accepted.

D. CHANGES AND SUBLETTING OF CONTRACT

1. Changes  
Changes in these specifications to the contract will be permitted only upon written mutual agreement of the CONTRACTOR and the TOWN. Without said approval any changes will be considered invalid.
2. 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.

E. COMPLETION DATE AND TIME SCHEDULE

1. Awarding of Contract  
Within a reasonable time after the opening of the PROPOSALS, the TOWN shall award a contract for the revaluation project. The TOWN reserves the right to reject any and all PROPOSALS as previously stated.
2. Signing of Contract  
Within a reasonable time after receipt of notice of acceptance by the TOWN of its PROPOSAL, as possibly revised by negotiation, the CONTRACTOR shall execute with the TOWN a contract upon the basis of these specifications.
3. Assessment Date  
The completed appraisals, upon approval of the ASSESSOR will serve as the basis for assessments effective on the Grand List of October 1, 2024. Notwithstanding dates mentioned in the revaluation schedule, all information on property record cards and computer database shall reflect actual information as of October 1, 2024.
4. Revaluation Schedule  
The revaluation work may be started at the convenience of the CONTRACTOR, but not later than September 18, 2023, and must continue in a diligent manner to ensure completion within the schedule of completion dates as set forth below.

The following phases of the revaluation must be completed in accordance with the following schedule:

- a. Commence project, meet with the ASSESSOR at Town Hall, pick up sales data for the last two months, and discuss the project, goals, timelines/deadlines, etc. no later than September 18, 2023.
- b. Conduct an impact study that estimates the 2024 assessed total amounts by state use code by January 15, 2024.
- c. Complete residential data collection (except for current building permits and inspections requested by the ASSESSOR or taxpayers) by April 1, 2024.
- d. Complete commercial, industrial, public utility, special purpose, and tax-exempt data collection by April 30, 2024 (except for current building permits and inspections requested by the ASSESSOR or taxpayers).
- e. Complete and deliver to the Assessor proposed neighborhood definitions and values by May 1, 2024.
- f. Complete land study with written report and land value map May 1, 2024.

- g. Complete building cost investigation including local builders with written report of same and cost manual by May 15, 2024.
- h. Complete study of market rents, expenses and capitalization factors set out in a written report by property category by June 10, 2024. Study shall show local information and analysis of comparable regional data and analysis where appropriate.
- i. Deliver completed residential appraisals in the CAMA Data Base with all measurements, sketches, listings, pricing, review, and values to the ASSESSOR by October 1, 2024.
- j. Deliver completed commercial, industrial, public utility, and special purpose, and exempt property appraisals in the CAMA Data Base with all measurements, sketches, listings, pricing, review, and values to the ASSESSOR by October 1, 2024.
- k. ASSESSOR completes review and final adjustments, no later than October 30, 2024.
- l. Final property record cards printed and arranged in street order, delivered to ASSESSOR no later than November 6, 2024.
- m. CONTRACTOR prints and mails, at CONTRACTOR's expense, "Assessment Change Notices" in compliance with Connecticut State Statutes, Section 12- 62(f) by November 15, 2024.
- n. Informal hearings to begin no later than December 2, 2024, and end no later than December 13, 2024. Hearings shall begin no sooner than fourteen days after the mailing of the assessment notices.
- o. Notices of results of informal hearings completed and mailed out, computer file updated and property record cards (of properties changed since the November 6, 2024, final delivery) printed, delivered to ASSESSOR, and merged with the final property record cards previously delivered no later than December 27, 2024.
- p. A completed Office of Policy and Management Performance-Based Revaluation Standards Certification Form with required attachments. Such certification shall indicate that the revaluation is in compliance with all requirements of the State of Connecticut, completed by December 30, 2024.

## F. PAYMENT SCHEDULE

### 1. Periodic Payments

Payments shall be made in the following manner:

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

The TOWN, upon determination by the ASSESSOR that the certification of the CONTRACTOR concerning work during said period is accurate, will pay to the CONTRACTOR a percentage of the total compensation under the contract equal to the percentage of the work certified as having been completed during said period, less ten (10) percent which is to be retained by the TOWN for payment to the CONTRACTOR at such time that he or she has performed fully and satisfactorily all its obligations, requirements, and litigation under the contract. The retained ten (10) percent of the contract price is to be paid

upon the completion of the work of the Board of Assessment Appeals on the October 1, 2024, Grand List.

2. Payment Schedule for Percentage of Completed Work

<b>Stages of Completion</b>	<b>Percentage of Total Project Cost</b>	<b>Amount Associated</b>
Bonding and Project Start-Up	_____ %	\$ _____
Data Mailers	_____ %	\$ _____
Data Collection & Verification – Residential	_____ %	\$ _____
Data Collection & Verification – Commercial/Industrial/Exempt	_____ %	\$ _____
Valuation Analysis - Land Study	_____ %	\$ _____
Valuation Analysis – Building Cost	_____ %	\$ _____
Valuation Analysis – Income and Expense Statements	_____ %	\$ _____
Field Review – Residential	_____ %	\$ _____
Field Review – Commercial/Industrial/Exempt	_____ %	\$ _____
Final Valuations; - Residential	_____ %	\$ _____
Final Valuations; Commercial/Industrial/Exempt	_____ %	\$ _____
Final Valuations: Properties that have changed since final values including properties with building permits	_____ %	\$ _____
Assessment Notices mailed	_____ %	\$ _____
Informal Hearings completed and final adjustments	_____ %	\$ _____
Board of Assessment Appeals completion of duties	_____ %	\$ _____
Litigation	_____ %	\$ _____
<b>TOTAL</b>	<b>100%</b>	<b>\$ _____</b>

\*The Bonding requirements set forth in Item (C) (1) above shall remain in effect until all litigation is completed.

This contract makes provision for a reduction of the performance bond to 10% of the contract price to ensure the defense of any appeals resulting from the revaluation work.

II. RESPONSIBILITIES OF THE CONTRACTOR

A. GOOD FAITH & TIMELINESS

The CONTRACTOR is responsible for fulfilling all requirements stated in this REQUEST FOR PROPOSAL in a timely fashion, and in a professional and satisfactory manner. During the course of this PROJECT, the CONTRACTOR shall work cooperatively with the ASSESSOR and shall

provide any reports, invoices, schedules and other information required by this RFP or requested by the ASSESSOR.

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

**B. PUBLIC RELATIONS**

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

Commencing at the start of the PROJECT and continuing until its completion, the CONTRACTOR shall provide reasonable assistance to the ASSESSOR in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs, and property owner groups as a means of establishing understanding and support for the revaluation program and sound assessment administration. The CONTRACTOR shall supply visual aids and other media at its disposal to this end. All public releases shall be approved by the ASSESSOR prior to release.

The CONTRACTOR shall place the assessment data onto the Town's website from the date that the revaluation notices are mailed (see section I.E.,4. m. of the Contract Specifications). The detailed information pertaining to all revaluated properties shall be approved by the Assessor, prior to appearing on the website.

The CONTRACTOR is responsible for providing its own telephone service including installation.

**C. CONDUCT OF COMPANY EMPLOYEES**

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

All employees are expected to maintain the highest possible standard of personal cleanliness and present a neat professional appearance at all times. The personnel shall wear identification at all times while engaged in the Revaluation project. The ASSESSOR may, at their discretion, request that any employee be removed from the PROJECT until such time as their appearance is deemed acceptable.

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

**D. RECORDS**

**1. General Provisions**

The CONTRACTOR shall provide all property record cards, computer supplies, other supplies, equipment, forms, literature, and papers to be used in this project at no additional cost to the TOWN. All forms shall be subject to approval by the ASSESSOR as to format, design, content, shape, size, color, quality, and quantity and shall be further subject to the approval of the Secretary of the Office of Policy and Management as may be required by Connecticut General Statutes. At the completion of the project, the CONTRACTOR shall provide the TOWN with a reasonable additional supply of the necessary forms used to support the CONTRACTOR'S computer assisted mass appraisal program.

**2. Records are TOWN Property**

The original or a copy of all records and computations, including machine readable data bases, made by the CONTRACTOR in connection with any appraisal or property in the TOWN shall, always, 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: 1) assessors maps; 2) land value maps; 3) materials and wages, cost investigations and schedules; 4) data collection forms, listing cards, property record cards with property valuations and sketches; 5) capitalization rate data; sales data; 7) depreciation tables; 8) computations of land and/or building values; 9) letters of memoranda to individuals or groups explaining methods used in appraisals; 10) operating statements of income properties; 11) duplicate notice of valuation changes; and 12) database of all property records, CAMA system, and integration with administrative system.

In addition, throughout the conduct of the revaluation, any criteria, guidelines, price schedules or statement of procedures used in such revaluation by the CONTRACTOR shall be provided by the CONTRACTOR for public inspection in the ASSESSOR'S office and shall be available thereafter, all in accordance with § 12-62(c) of the Connecticut General Statutes.

3. Assessor's Records

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

The ASSESSOR will permit the CONTRACTOR to use all the current residential data including computerized sketches. The ASSESSOR'S existing CAMA database shall be available to the CONTRACTOR.

4. Property Record Cards (Street Cards)

The CONTRACTOR shall complete Property Record Cards, commonly referred to as "Street Cards", and filed in street order as required by the Assessor or in another mutually agreed upon order.

E. ASSESSMENT NOTICES

No later than November 15, 2024, a notice shall be sent, at the CONTRACTOR'S expense 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 and in conformity with the Connecticut General Statutes, as from time to time amended. Enclosed with such notice shall be a letter specifying the dates, times, and place of the informal public hearings with an explanation as to the appeal process. The CONTRACTOR will provide the needed information for the notice. Also enclosed with such notice shall be the CONTRACTORS phone number, hours of operation, and information specifying the dates, times and places of the informal public hearings. Such notices shall be subject to approval by the ASSESSOR. The CONTRACTOR shall notify the ASSESSOR of any returned assessment notices. The CONTRACTOR shall re-mail any notices when and/or if the ASSESSOR is able to obtain corrected addresses.

Notices shall include both market value, assessments and PA 490 assessments and all other exemption amounts.

At the time assessment notices are mailed, the CONTRACTOR shall provide two bound reports of every assessment sorted by name and property location. A set of reports shall be made

available at selected public buildings. In addition, all recorded property data shall be made available on a free access web site at the time assessment notices are sent.

#### F. INFORMAL PUBLIC HEARINGS

At a time mutually agreeable to the ASSESSOR and the CONTRACTOR, but not later than December 2, 2024, and following completion of all review work by the ASSESSOR and the CONTRACTOR, the CONTRACTOR shall hold public hearings so that owners of property or their legal representatives may appear at specified times to discuss with qualified members of the CONTRACTOR'S staff, the valuations of their property. The CONTRACTOR'S personnel shall explain the manner and methods of arriving at value.

The CONTRACTOR, in conjunction with the recommendations of the ASSESSOR, shall schedule enough hearings and provide sufficient personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer, or their legal representative, shall be given consideration, and adjustments shall be made where warranted. The informal public hearings shall be completed by December 13, 2024.

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

The CONTRACTOR shall be responsible for sending notice, not later than December 27, 2024, by First Class mail at the CONTRACTOR'S expense, to each taxpayer or his or her legal representative who appears at these hearings seeking a review of valuation. Such notice shall include the original valuation determined by the CONTRACTOR and any adjusted valuation as deemed appropriate based on any information received at such hearing, or a statement that no change is warranted. Such notice shall be subject to approval by the ASSESSOR.

#### G. BOARD OF ASSESSMENT APPEALS

The CONTRACTOR shall have a qualified member or members, approved by the ASSESSOR, of its staff, available for attendance at any deliberations of the Board of Assessment Appeals held after the completion of the revaluation, Sundays excluded, but such availability and attendance shall not be required after the date for the completion of the duties of the Board of Assessment Appeals on the October 1, 2024 Grand List, to assist in the settlement of complaints and to explain the valuations made.

#### H. LITIGATION

In the event of appeal to the courts, either pursuant to Section 12-117a or Section 12-119 of the Connecticut General Statutes (as amended from time to time), the CONTRACTOR shall furnish a competent witness or witnesses with first-hand knowledge of the project to defend the valuation of the properties appraised until final adjudication it being understood that the CONTRACTOR shall furnish two days of said witnesses for each court action instituted on the October 1, 2024 Grand List assessments at no charge, after the initial two days, the diem rate will be charged for pretrial meetings with an attorney representing the town for court appeal, or for appraisal report preparation. If an action arises to revoke the revaluation of the October 1, 2024, Grand List, the CONTRACTOR shall provide competent witnesses to defend the revaluation at no cost to the Town.

##### 1. Narrative Reports

Should court testimony be required, a fully documented narrative report will be presented. This report will include at a minimum: purpose of the appraisal, scope and function of the

appraisal, property rights appraised, definitions of market value, identification of property, regional data, town data, neighborhood data, zoning information, tax information, location and site data, description of improvements present use, highest and best use, valuation method, cost approach, sales comparison approach, reconciliation, limiting conditions and certification and photographs of the subject. An appraiser who holds a general certification in the State of Connecticut will prepare reports.

2. Assessment Change

The CONTRACTOR shall not be held responsible for any assessment changed from the original valuation figure by parties other than the CONTRACTOR, unless the figure determined by the CONTRACTOR was unreasonable, insupportable, or clearly erroneous in the opinion of the ASSESSOR.

I. INFORMATION

1. Information to TOWN

The CONTRACTOR shall give to the ASSESSOR all information requested pertaining to the PROJECT for a period of one year after completion of the duties of the Board of Assessment Appeals on the October 1, 2024, Grand List, without any additional cost to the TOWN.

2. Work Schedule

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

3. Discrepancy Report

When field inspections are completed, the CONTRACTOR shall compile a report, which lists all discrepancies between the property information listed on the current property record cards in the office of the ASSESSOR and the information collected during the field inspection. The report shall list major differences such as construction and improvements that may have taken place on the property since the last physical inspection for the 2019 revaluation. Major differences would include square footage, interior improvements, additions, outbuildings, and yard improvements.

4. Periodic Status Reports

The CONTRACTOR shall submit to the Assessor bi-weekly status reports as well as any work completed that are to be reviewed by the Assessor. The report shall contain specifics as to the work completed and the work to be done in the next month. The Assessor shall review and evaluate the progress of the project and shall notify the CONTRACTOR whether the work performed is satisfactory and timely.

5. Transmittal Of Records to the ASSESSOR

Regular periodic delivery of appraisals, as completed, shall be turned over to the ASSESSOR for review. All appraisals of buildings either completed or under construction and all completed and corrected records shall be turned over to the ASSESSOR by the dates specified in the schedule agreed upon by the ASSESSOR. All documentation employed in conjunction with this program shall become the property of the ASSESSOR. 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, 2024. 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.

6. Certification

The CONTRACTOR shall meet all requirements set forth in this document and no exceptions and or amendments may be made unless expressly authorized by the ASSESSOR. 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 State Statutes. As a condition of successful project completion, the CONTRACTOR'S work product must meet all certification requirements of the ASSESSOR and OPM.

J. BUILDING COST SCHEDULES

1. General

The CONTRACTOR shall prepare for usage in the program as hereinafter specified, building cost schedules. These schedules will reflect the unit-in-place method based upon the square foot or cubic foot area of building as applicable. These schedules shall be used in computing the replacement cost in the TOWN for all residential, commercial, industrial, public utilities, exempt and agricultural 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. The ASSESSOR shall approve all finalized schedules before adoption and usage by the CONTRACTOR.

2. Types of Cost Schedules

a. Residential

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

b. Commercial

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

c. Industrial and Special Structures

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

d. Farm

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

3. Depreciation Schedules

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

4. Schedules for TOWN

The CONTRACTOR shall supply and leave for the TOWN, not less than two (2) copies of all the above required building cost schedules and depreciation schedules for the TOWN'S usage, one copy of which shall be turned over to the ASSESSOR upon approval of the schedules.

III. APPRAISAL SPECIFICATIONS

A. APPRAISAL OF LAND

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

1. Land Inspection

The CONTRACTOR shall make a physical inspection of each plot or lot and note topographical irregularities, such as high banks and steep slopes or anything else, which may detract from the usefulness and value of the land.

2. Land Value Study

Land shall be valued based on an analysis of all sales data occurring during the three- year period prior to October 1, 2024 (or such other reasonable period as deemed necessary by the ASSESSOR). The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the ASSESSOR.

The CONTRACTOR shall make a careful investigation of this data and shall consult owners, real estate agents, banks, and other sources for information relative to sales of properties within the TOWN. All factors affecting the final values of land shall be considered, such as location, zoning, utilities, size, vacancy, form of ownership, non-conforming uses, zoning variances and those factors that might affect land value such as topographical irregularities, high banks, steep slopes, and other factors that may detract from or add to the usefulness of the land.

This study shall be set out in a written report delivered to the Assessor as per the schedule in Section. I.E.,4. f.

3. Land Value Unit

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

4. Land Value Map

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

5. Neighborhood Delineation

After consideration of the environmental, economic, and social characteristics of the TOWN, the CONTRACTOR shall, with the cooperation and approval of the ASSESSOR, delineate "neighborhood" units within the TOWN. Each neighborhood unit will, in the CONTRACTOR'S opinion, exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. These

neighborhood codes shall be recorded and maintained on all property record cards and the computer database.

6. PA 490, Farm Forest and Open Space

The ASSESSOR shall be responsible for determining the use value for all land. The ASSESSOR shall provide the CONTRACTOR with land rates for property classified under PA 490 as Farm, Forest, and Open Space. The CONTRACTOR shall aid the ASSESSOR in the process of applying these land rates to all such designated parcels.

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES

The CONTRACTOR shall physically view and make a listing of physical construction details of all residential buildings and structures and all structural improvements appurtenant to residential property in the TOWN, on proper forms as previously covered in these specifications and including one (1) digital photograph.

The CONTRACTOR will attempt to conduct a complete interior and exterior inspection of sold residential properties, those properties with active building permits, and those where discrepancies are noted via data mailers, where appropriate.

1. Interior Inspections

- a. The CONTRACTOR is to perform interior inspections of all sale properties to be utilized in the appraisal analysis that have sold during the time frame of October 1, 2023, thru October 1, 2024.
- b. The CONTRACTOR is to perform interior inspections of all outstanding building permits which influence market value.
- c. The CONTRACTOR is to perform interior inspections in response to discrepancies noted via data mailers, where appropriate.
- d. The data collector shall have each interior inspection verified, including the date of the inspection, by having an adult owner or resident of each building or dwelling unit sign the data collection form. Signature refusals shall be noted.
- e. When entrance to a building for an inspection is refused, the data collector shall make note of the fact and within two (2) working days, notify the ASSESSOR of the fact in writing, giving the facts as to the time of the visit and if possible, the name of the party refusing entrance and other pertinent information. The ASSESSOR shall review the situation, and if unable to gain the cooperation of the party involved, she shall so notify the CONTRACTOR, and they shall proceed to estimate the value of the building based on facts ascertainable without entry and make adequate notations of the lack of cooperation, and the manner of arriving at value, conspicuously on the property record card.
- f. The data collection form, CAMA system, and final property record card shall indicate the initials of the data collector and the date(s) of the inspection(s).
- g. If after the initial inspection, contact was not established with a property owner, a notification letter approved by the ASSESSOR, shall be mailed by the CONTRACTOR, notifying the property owner that the representatives of the CONTRACTOR were not able to make contact, and requesting that within a prescribed time limit the property owner contact the CONTRACTOR, by telephone or mail, for alternative arrangements for the

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

2.

3. Exterior Inspection

- a. The perimeter of all improvements shall be carefully reviewed for accuracy against the ASSESSOR'S current records.
- b. If it is evident to the data collector that the existing outline sketch or any part thereof is inaccurate for any reason, it shall be re-measured; or if no sketch presently exists, such as for new construction, the improvements shall be measured to the nearest foot.
- c. Physical data of the parcel shall be recorded on the data collection form at the site.
- d. Existing sketches in the current residential CAMA system and on current commercial and industrial record cards in the ASSESSOR'S office will be made available to the CONTRACTOR for verification.
- e. The CONTRACTOR shall update all physical data on the CAMA System.

4. Field Review

All properties shall be reviewed in the field by the CONTRACTOR'S personnel qualified as reviewers, as previously prescribed in these specifications.

The properties shall be reviewed for classification, final value, and to assure that their value is correlated to comparable properties. The ASSESSOR shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation.

5. Pricing and Valuations

Pricing and valuations of all land and buildings must reflect the fair market value as of October 1, 2024 and shall be done from and in accordance with the previously approved manuals and schedules.

The final valuation shall be the fair market value of the land, buildings, and other improvements, as they exist on October 1, 2024. The final valuation shall be determined after a correlation of (1) replacement costs of the buildings and improvements, less depreciation from all causes plus the market value of the land. All factors affecting the value of the property shall be noted on the property record card.

6. Sales Analyses

Sales analyses of residential properties shall be performed as a means of substantiating the values derived. These analyses shall be done on the aggregate of all residential properties, on each of the neighborhoods, on residential properties by type, by classification, age, and size. The sales analyses shall include, at a minimum, sales ratios, mean, median, mode, standard deviation, coefficients of variance and dispersion, price-related differential, and confidence rating. Any additional requests for sales analyses by the ASSESSOR shall also be performed. These analyses shall be set out in a written report to the ASSESSOR.

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

The CONTRACTOR shall make a listing of physical construction details of all commercial, industrial, public utility, special purpose and exempt buildings and structures and all structural improvements appurtenant to said property in the TOWN including one (1) digital photograph.

1. General

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

2. Description

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

3. Income Approach

Income and expense data gathered by the TOWN shall be utilized by the CONTRACTOR for income producing and, where appropriate, owner-occupied properties. Any income and expense data with accompanying summary reports and rent schedules shall become property of the TOWN. All information filed and furnished with the income and expense report shall not be a public record and is not subject to the provisions of Section 1-200 et. seq. (Freedom of Information Act) of the Connecticut General Statutes. From these returns and other data sources, such as field investigations and interviews, the CONTRACTOR will establish market or economic rent and expenses for income producing properties. The CONTRACTOR shall also develop capitalization rates by investigating sales and income data. Rates shall be established for the various classes of property and checked by bankers, investors, and appraisers to ensure their accuracy. When the ASSESSOR has approved the rates and methods, the CONTRACTOR shall perform the income approach using both actual and economic income and expenses.

4. Yard and/or Site Improvements

All yard improvements shall be listed and valued separately.

7. Field Review

A final review and inspection shall be made in the same manner and for the same purposes as prescribed for residential properties. The reviewer shall be completely trained and fully experienced in the appraisal of the type and kind of commercial, industrial, public utility or special purpose building; the final value of which he or she is responsible.

The properties shall be reviewed for classification, final value, and to assure that their value is correlated to comparable properties. The reviewer shall be completely trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building. The ASSESSOR shall be notified of the dates of reviewing and be entitled to accompany the reviewer during this phase of the revaluation.

D. CONTROL AND QUALITY CHECKS

1. Field Checks

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

2. Building Permits

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

3. Incomplete Construction

The CONTRACTOR shall provide the ASSESSOR with a report of all property record cards that have incomplete improvements on the October 1, 2024, Grand List. The property record card shall show the percentage of completion and reflect the percentage of completion in the valuation as of that date.

4. Sales Analyses

Sales analyses of properties sold 12 month prior to the revaluation date shall be performed as a means of substantiating the values derived. These analyses shall be done on the aggregate of all residential properties and on each of the neighborhoods previously delineated. The sales analyses shall include, at minimum, sales ratios, coefficients of dispersion, price-related differential, and sold/unsold property test. Any additional requests for sales analyses by the ASSESSOR shall also be performed.

5. Performance Based Revaluation Standards

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

IV. RESPONSIBILITIES OF THE TOWN

A. NATURE OF SERVICE

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

B. COOPERATION

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

C. ITEMS FURNISHED BY THE TOWN

The TOWN shall furnish the following:

1. Maps

The TOWN shall furnish open access to the TOWN GIS with hardcopy maps generated as needed and currently available showing streets, and property lines and boundaries. In addition the TOWN shall furnish the CONTRACTOR with copies of all property splits, mergers, and subdivisions, not recorded on the GIS system.

The CONTRACTOR shall notify the ASSESSOR of any discrepancies discovered during the course of the PROJECT field inspections.

2. Land Dimensions

The TOWN will make available lot sizes and total acreage to the CONTRACTOR of all pieces of property where the map or present records fail to disclose measurement or acreage.

3. Zoning

The TOWN will make available current TOWN zoning regulations and zoning maps.

4. Existing Property Record Cards

The TOWN will make available the present property record cards and present data bases for use by the CONTRACTOR.

5. Property Transfers

The TOWN shall notify the CONTRACTOR, on a regular basis, of property splits and transfers occurring after the initial creation of the revaluation database by the CONTRACTOR. The CONTRACTOR shall update the revaluation database as necessary.

6. Building Permits

The TOWN shall make available copies of all building permits issued during the revaluation project up to October 1, 2024.

7. Income and Expense Forms

The TOWN shall make available all copies of the Income and Expense information (Form M-58) received by the TOWN for the 2021, 2022, 2023, and 2024 filing periods. All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section 1-200 et. seq. (Freedom of Information Act) of the Connecticut General Statutes.

8. Signing of Communications

The TOWN shall sign, by the ASSESSOR, communication to be mailed at the CONTRACTOR'S expense, for the purpose of contacting a property owner for inspection of the property and/or 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. Mailing Address the TOWN shall make available through the ASSESSOR'S or Revenue Collector's Office the current mailing address and other relative data that exists on the administrative program for all property owners.

10. Work Area

The TOWN shall furnish to the CONTRACTOR sufficient work area necessary to carry out the terms of this contract. There will also be space provided for meetings and conducting the informal hearings. This accommodation will be provided at no charge to the CONTRACTOR throughout the duration of the PROJECT.

V. TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR

A. REVIEW SHEETS

Within 4 weeks of the start of data collection and on a weekly basis thereafter, the CONTRACTOR shall submit to the ASSESSOR reports generated through the CAMA system for review. These reports shall show all manner of information collected by data collectors, including sketches, whether there was an interior inspection or not, and outbuilding information. These reports will be reviewed by the CONTRACTOR for quality control prior to their submission to the ASSESSOR.

B. APPRAISAL RECORDS

Delivery of appraisals shall be in accordance with a schedule agreeable to the ASSESSOR and shall be turned over to the ASSESSOR for review. All appraisals of buildings either complete or under construction, shall be completed as of October 1, 2024. All completed and/or corrected records shall be turned over to the ASSESSOR as of January 6, 2025. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected, including building permits, in order that the final appraisal of property shall be appraised as of October 1, 2024.

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

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the ASSESSOR and, at least bi-weekly, an approved representative of the CONTRACTOR, shall meet with said ASSESSOR to discuss the progress and various other details of the project.

C. PERFORMANCE-BASED REVALUATION CERTIFICATION

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

D. REPORTS

The CONTRACTOR shall deliver all reports required by these CONTRACT SPECIFICATIONS, such as the incomplete construction report, informal hearing report, property, manuals, cost schedules, depreciation schedules, land value study, and discrepancy report.

**APPENDIX B**



# Detailed LA4 PUTNAM, CT

LAND USE	Parcel Count	LAND VALUE	BUILDING VALUE	TOTAL VALUE	PERCENT LAND	PERCENT BUILDING
1-1-1-Family	2070	58,888,700	241,417,020	300,305,720	19.61%	80.39%
1-12-2-Family	279	5,803,000	24,801,600	30,604,600	18.96%	81.04%
1-13-3-Family	108	2,173,300	11,578,600	13,751,900	15.80%	84.20%
1-14-4-Family	50	999,700	5,940,000	6,939,700	14.41%	85.59%
1-5-Res. Condo	327	0	38,778,013	38,778,013	0.00%	100.00%
1-9-Multiple Dwellings	50	1,251,200	7,535,600	8,786,800	14.24%	85.76%
2-1-Commercial	198	23,708,000	81,362,495	105,070,495	22.56%	77.44%
2-11-Commercial	6	884,700	5,541,600	6,426,300	13.77%	86.23%
2-10-Commercial Condo	16	0	2,754,300	2,754,300	0.00%	100.00%
2-6-Apartments	27	1,915,800	14,376,100	16,291,900	11.76%	88.24%
3-1-Industrial	59	5,527,100	41,168,650	46,695,750	11.84%	88.16%
3000-Mixed Use	7	626,600	1,101,200	1,727,800	36.27%	63.73%
4-1-Utility Vacant Land	8	245,600	17,600	263,200	93.31%	6.69%
4-2-Utility	1	50,500	88,900	139,400	36.23%	63.77%
4240-Elecsubsta	1	48,100	277,600	325,700	14.77%	85.23%
5-1-Res. Land	298	6,399,300	2,017,000	8,416,300	76.03%	23.97%
5-2-Comm Land	35	2,647,800	477,200	3,125,000	84.73%	15.27%
5-3-Ind land	19	974,600	0	974,600	100.00%	0.00%
6-1P-Pasture F	4	6,500	86,300	92,800	7.00%	93.00%
6-1W-Woodland	8	59,500	391,800	451,300	13.18%	86.82%
6-2-Forest	18	87,800	0	87,800	100.00%	0.00%
6-3-Open Space	65	292,300	25,500	317,800	91.98%	8.02%
900A-Federal	2	281,300	6,163,100	6,444,400	4.37%	95.63%
901C-Municipal	13	760,900	36,858,300	37,619,200	2.02%	97.98%

# Detailed LA4 PUTNAM, CT

901I-Municipal	3	274,400	6,372,600	6,647,000	4.13%	95.87%
901V-Town Land	80	2,598,500	336,500	2,935,000	88.53%	11.47%
902-State	1	33,000	0	33,000	100.00%	0.00%
907-Fire Vol.	2	99,200	2,128,500	2,227,700	4.45%	95.55%
909-Education	3	85,700	6,339,700	6,425,400	1.33%	98.67%
909R-Educational Resident	1	28,700	256,700	285,400	10.06%	89.94%
911R-Historical	1	32,300	103,200	135,500	23.84%	76.16%
912-Charitable Residential	3	90,500	631,800	722,300	12.53%	87.47%
913-Charitable Vacant	8	482,900	0	482,900	100.00%	0.00%
917-Cemetery	1	88,000	26,900	114,900	76.59%	23.41%
917V-Cemetery	7	244,800	3,600	248,400	98.55%	1.45%
918-Church	10	329,900	5,745,700	6,075,600	5.43%	94.57%
918V-Church	3	87,900	3,900	91,800	95.75%	4.25%
919-Parish Hou	3	100,600	539,100	639,700	15.73%	84.27%
920-Church Sch	1	74,200	491,500	565,700	13.12%	86.88%
922-Rec Facil	1	74,700	4,182,100	4,256,800	1.75%	98.25%
926C-Infermary	1	2,000	0	2,000	100.00%	0.00%
927-Clergy	1	57,400	2,437,300	2,494,700	2.30%	97.70%
927R-Clergy	2	51,800	282,300	334,100	15.50%	84.50%
928C-Hospital Condo	3	0	1,258,300	1,258,300	0.00%	100.00%
930-Health Car	2	105,100	3,568,700	3,673,800	2.86%	97.14%
931-Veterans	1	23,000	269,700	292,700	7.86%	92.14%
931V-VETERANS VAC	1	3,900	0	3,900	100.00%	0.00%
940-Admin.	1	32,900	1,588,200	1,621,100	2.03%	97.97%
944-Hospital	1	35,100	694,500	729,600	4.81%	95.19%
944R-Hospital	1	24,400	184,000	208,400	11.71%	88.29%

## Detailed LA4 PUTNAM, CT

944V-Hospital	1	2,800	0	2,800	100.00%	0.00%
946V-Recreation	3	242,100	0	242,100	100.00%	0.00%
947-DOT	1	294,800	576,700	871,500	33.83%	66.17%
947V-DOT	3	83,100	0	83,100	100.00%	0.00%
948-Misc.	3	208,600	0	208,600	100.00%	0.00%
949C-Highway	1	100	0	100	100.00%	0.00%
951-Hospital	2	2,442,500	46,282,500	48,725,000	5.01%	94.99%
951C-Hospital	4	316,400	0	316,400	100.00%	0.00%
955C-Nursing	1	123,900	5,861,500	5,985,400	2.07%	97.93%
995-CIOA MAIN	1	0	0	0	0.00%	0.00%
998-Exempt/Com	1	50,100	183,600	233,700	21.44%	78.56%
Totals	3,832	122,457,600	613,107,578	735,565,178		