

## **Request for Proposal #**

### **Valuation, Data Collection, and Video Imaging Services**

The Consolidated Town and Borough of Naugatuck ("Borough"), Connecticut is seeking proposals to revalue all real property within the Borough, effective 1 October 2012, utilizing CAMA software currently licensed to the Borough. The Borough is also seeking the following services: preparation and mailing of Data Mailer Questionnaires to property owners, full data collection and verification of residential properties with no data mailer returns, full data collection and verification of properties sold 24 months prior to 1 October 2012, and Video Imaging Services in conjunction with the revaluation program. Contractors interested in providing the revaluation services set forth in the attached specifications are invited to deliver three (3) paper copies of their proposal to:

Town and Borough of Naugatuck  
Attn: Wendy Hozer Purchasing Agent

229 Church Street  
Naugatuck, Connecticut 06770

Proposals must be sealed and marked with the bid number and title.

All information pertaining to the Contractor's technical and management approach to completing this project, as well as the proposed cost, timetable and staffing plan, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request for Proposals (RFP) in order to be considered responsive. Any proposal that does not address each issue in may be rejected as non-responsive.

The Borough may choose to interview selected candidates at a date, time and place to be determined.

The Purchasing Authority reserves the right, as requested by the Assessor, to amend this proposal at any time prior to the deadline for submission of proposals, and to reject any or all proposals received that are not in the best interests of the Borough. The Town and Borough of Naugatuck is also requesting that the proposal include video imaging services. All data entry will be the responsibility of the Contractor.

The Borough also wishes to use the Internet and World Wide Web as a means of sharing data with the public.

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

1. Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least sixty (60) calendar days from the deadline for the submission of proposals.
2. List of Connecticut Municipalities for which the Contractor has completed revaluation programs.
3. List of Connecticut Municipalities for which the Contractor has performed video imaging services.

4. List of Connecticut revaluation contracts for which the Contractor is currently committed.
5. Description of the CAMA system, including (1) valuation methodology, (2) necessary computer hardware specifications, (3) operating system software.
6. Description of Data collection and management process.
7. Description of the Contractor's public relations program that would be used during the revaluation.
8. Copy of Contractor's current Connecticut revaluation certificate.
9. Bid Bond or certified check for ten percent (10%) of the proposal value submitted.

### **SCOPE OF REVALUATION**

The project shall be for the complete reappraisal of all taxable real estate, and exempt real estate within the corporate limits of the Town and Borough of Naugatuck, Connecticut, as of 1 October 2012, as described below.

1. All taxable real estate, land, buildings, and improvements.
2. All exempt real estate, land, buildings, and improvements.
3. All public utility land and buildings.

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 and regulations pertaining hereto, and shall be subject to the direct supervision and approval of the Assessor of Naugatuck, Connecticut.

The value to be determined shall be 70% of the full fair market value as defined in the Connecticut General Statutes and shall be based upon recognized methods of appraising.'

### **TOWN DATA**

1. The last revaluation was effective as of 1 October 2007.
2. The population is estimated to be 31,872 as of the 2006 US Census.
3. The area of the town is 16.5 square miles.
4. Administration/Tax Billing System is KVS.
5. CAMA System presently used is VISION.
6. The Parcel Count as of 30 September 2011 is 11,239.

The Contractor shall value all newly constructed improvements created prior to October 1 2012, or those incomplete as of this valuation date, and these parcels shall be included in the contract price and valued in the same manner as stated above, and as provided hereinafter.

*The appendix on the last page will provide the number and classification of parcels within the municipality.*

## **Specifications for Reappraisal and Revaluation**

### **SECTION I: GENERAL CONDITIONS**

#### **A. Contractor**

##### **1. Certification**

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

##### **2. Proposals**

Each proposal submitted shall include a copy of the Contractor's Connecticut Revaluation Company Certificate and shall itemize the Contractor's qualifications and experience. The Contractor shall submit a complete client list of municipalities served during the last five years and include a description 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.

3. The Company shall not make any changes to this Request for Proposal as presented. The proposal shall reflect all costs required fulfilling the contract as stated. The proposal shall be in the same format as this RFP.

#### **B. Personnel**

The Contractor shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of both the federal and state governments. The Contractor shall adhere to all other legislation relating to employment procedures.

##### **1. Qualifications of Personnel**

All personnel assigned to this project shall be subject to approval of the Assessor and shall be subject to removal from this project by the Contractor upon the written request of the Assessor.

##### **2. 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,

and who shall have not less than five years of practical appraisal experience in the appraisal of residential, commercial, industrial and farm properties.

**b. Reviewers and Appraisers**

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program and shall have at least three years of practical experience in Connecticut in the appraisal of particular types of properties for which they are responsible.

**3. Identification**

All field personnel shall carry suitable identification cards supplied by the Contractor and signed by the appropriate municipal official. Such cards shall be laminated and include a recent photograph. All motor vehicles used by field personnel shall be reported to the appropriate municipal official, giving license number, make, model, year and color of vehicle.

**4. Conflict of Interest**

No resident or Town employee shall be employed by the Contractor, except for clerical purposes, without prior written approval of the Assessor.

**C. Protection of the Town**

**1. Bonding**

The Contractor shall furnish to the Town a performance surety bond, in the amount of this contract, that is provided by a bonding company authorized to do such business in the State of Connecticut. Said bond shall be in a form satisfactory to and approved by the Town attorney, and must be delivered to the Town prior to the commencement of actual work. This bond shall include the appeal requirements of these specifications. It is understood and agreed upon that the completion of the approved delivery to the Town of the revaluation project that the performance bond shall be reduced to 10% of the value of the contract to cover the defense of any appeals as described below. This reduced amount of bond shall become effective after the revaluation project 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 doings of the Board of Assessment Appeals on the Grand List of 1 October 2012.

**2. Insurance**

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

- a.** Worker's compensation insurance in accordance with the Connecticut Worker's Compensation Laws of the State of Connecticut.

- b. Public liability and property damage insurance naming the Town as the "insured" on all policies, and will hold the Town harmless and completely indemnify the Town against all claims and damages with limits of \$1,000,000 for bodily injury and \$1,000,000 for property damage. A certificate shall be provided to the Town, prior to the commencement of actual work and shall be in a form satisfactory to and approved by the town attorney.
- c. The Contractor shall save the Town harmless from liability of any nature or kind, including costs and expenses for or on account of, any patented or copyrighted equipment, materials, articles, or processes used in the performance of this contract.

### **3. Penalties**

- a. The Contractor may be subject to payment of liquidated damages for failure to perform the defined work according to the project schedule:
  - 1. Completed street cards with all measurements, listings, pricing, review, and final valuation.
  - 2. Assessment notices sent out, hearings completed for those who wish to be heard, and all calculations completed and ready for the Board of Assessment Appeals.
  - 3. Written certification by the Assessor that the Contractor has fulfilled all contractual requirements of said project.
    - a. Liquidated damages, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, acts of God, or an order of court or other public authority are expected.

### **D. Completion Date and Time Schedule**

#### **1. Contract Award**

Within a reasonable time after the opening of the proposals, the Town shall award the contract for the reappraisal and revaluation project. The Town reserves the right to reject any and all bids as previously stated.

#### **2. Contract Execution**

Within thirty (30) days after the receipt of notice of acceptance by the Town of its proposal, the Contractor shall execute with the Borough the contract upon the basis of these specifications for reappraisal and revaluation.

#### **3. Changing: and Subletting: of Contract**

##### **a. Changes**

Changes in these specifications for reappraisal and revaluation in the contract will be permitted only upon written mutual agreement of the Contractor and the Borough.

**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 Borough and the bonding company. It shall 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 for Reappraisal and Revaluation, and the contract.

**4. Time Schedule**

The revaluation work must start by January 2, 2012. The Contractor is subject to liquidated damages if the following completion dates are not met:

**a. Completion Dates**

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

1. Data Mailers sent by April 1, 2012
2. Data Mailers Review completed by June 1, 2012
3. Data Collection of Sales and Data Mailer Discrepancies completed by July 1, 2012
4. Completed field cards with all measurements, listings, by September 1, 2012
5. Pricing, review, and final valuation completed by October 1, 2012
6. Deliver completed CAMA data base with digital images, property record cards with all measurements, listings, sketches, pricing, and suggested values to the Assessor by October 1, 2012.
7. Assessor completes review and final adjustments made for real property no later than November 10, 2012
8. Assessment change notices mailed to comply with the requirements of Connecticut State Statutes , section 12-62(f) by November 16, 2012 Contractor to pay postage)
9. Informal hearings to begin no later than November 29, 2012 and end no later than December 20 2012
10. Notices of results of the informal hearings completed on forms approved by the Assessor and mailed out (Contractor to pay postage) computer filed and final property record cards printed and delivered to the assessor in alphabetical street order no later than December 30, 2012.

**a. Assessment Date**

The completed appraisals, upon approval of the Assessor, will serve as a basis for assessment effective on the Grand List of 1 October 2012.

**b. Project Timetable**

The Contractor is required to submit, before the commencement of the project, the

timetable for the entire project. The timetable must be followed by the Contractor. Any variation of the timetable must have the prior express consent of the Assessor.

**E. Payment Schedule**

Payments shall be made as follows: At the end of each thirty day period of the contract, the Contractor is to certify, in writing, a progress report noting the percentage of the total work completed during the said thirty day period. Such notification will itemize and accurately indicate the extent and nature of work performed by volume, street, category, or in any other manner required by the Assessor.

1. The Borough, after determining the certification is accurate, will pay to the Contractor a percentage of the total compensation under this contract, commensurate to the percentage of work certified as completed, less ten percent (10%) which will be retained by the Town for payment to the Contractor upon successful and full completion of all obligations, requirements, and litigation under the contract.
2. The retained ten percent (10%) of the contract price is to be paid upon the Board of Assessment Appeals completion of its duties on the 1 October 2012 Grand List.

**SECTION II: CAMA REQUIREMENTS**

**A. Assessment Administration Module**

1. Before commencement of sales data collection, each parcel on the legal File/ administrative file must be located and matched with the tax maps. A list of all discrepancies between the legal file/administrative file and the tax maps shall be submitted to the Assessor together with recommendations for correcting the discrepancies. The Contractor must implement the recommendations approved by the Assessor by October 1, 2012.
2. The assessment administration module shall have the ability to interface with the CAMA System and tax collection modules. The Contractor is responsible for matching all parcels and accounts in the appraisal file with the administrative file. The Contractor shall be responsible for entering an account number or other acceptable means of parcel identification on the CAMA System, from which the ability to transfer values from one system to other arises. A list of all discrepancies between the appraisal and administrative system shall be submitted to the Assessor, with recommendations for correcting such discrepancies. The Contractor shall be responsible for all costs of bridging the CAMA System to the administrative/tax billing system.

**B. CAMA System**

1. The valuation module shall provide for the determination of the value of all real property based on accepted appraisal methodology, using a table- or formula-driven system. At a minimum, the valuation module shall have the ability to perform the tasks described below and conform to all requirements and recommendations of the Office of Policy & Management. The CAMA System must meet the requirements as provided for in Section 12-62f- 1 to 12-62f-6 of the Regulations of Connecticut State Agencies.
  - a. With respect to land, the valuation module shall have the capacity to compute value based upon one or more of the following: Square feet; acreage; standard lot size; frontage/depth. In addition, the module shall allow for the editing of land values based upon market-derived adjustment factors, using at least two of the following:  
unit value; fractional acreage; and front foot adjusted for depth.
  - b. With respect to residential property, the valuation module shall have the capacity to: Compute replacement cost new, less depreciation; provide user-modifiable tables or formulas for various types of buildings; provide user-modifiable depreciation tables for age and condition variables; compute the value of each yard improvement (e.g., swimming pool, tennis court, detached garage, and shed); allow for the acceptance, rejection or adjustment of table- or formula-derived values; allow for on-line sketch input; provide for the automatic computation of total square footage; provide for the automatic computation of gross living area; and provide for the computation of other area measurements as defined by the user. In addition, the valuation module shall have the capacity to allow user modifiable selection criteria to identify up to three properties that are most comparable to the property whose value is being determined.
  - c. With respect to apartment, commercial and industrial properties, the valuation module shall have the capacity to: Compute replacement costs new, less depreciation; compute the value of each yard improvement (e.g., paving, and fencing); allow for the acceptance, rejection or adjustment of table- or formula-derived values; and provide for the automatic computation of total square footage. In addition, said module shall have the capacity to compute the value of property using the income approach by use of the direct capitalization method.
2. The valuation module shall also have the capacity to: Print a property record card with the appropriate fields listed in the data management module; allow flexibility of design of the data printed on a property record card, based on the discretion of the assessor; provide for the random printing of cards; provide for printing sketches to show dimensions; insure the closure of such sketches; and provide for the creation of multi-page property record cards for a parcel.
3. The valuation module shall include a general report writer capable of printing to screen and hard copy, and/or providing the data listed in the data management module using electronic files or digital media. In addition, such application shall have the capacity to produce reports for statistical and comparable sales analysis based upon pre-defined and user-defined criteria.



4. Output to standard analytical software programs the following measurements and sales/assessment ratios by property type and neighborhood: Sales prices; assessments; the mean sales/assessment ratios by property type and neighborhood: sales prices; assessments; the mean sales/assessment ratio; the median sales/assessment ratio; the coefficient of dispersion; the standard deviation; the coefficient of variation; the price related differential; and the "unsold property test".

### **C. Imaging**

A visual imaging database, integrated within the CAMA System installed by the Contractor, shall be in place by the completion of this project. This will provide the Town with the ability to randomly retrieve an image of any parcel described on the CAMA data file.

### **D. GIS (Geographic Information System)**

Software and services necessary to integrate the existing CAMA system with an electronic mapping system, maintained by other Borough departments, shall be in place by the completion of this project. This will provide the Borough with the ability to access the existing electronic mapping database through the existing CAMA system/software. It will also provide the Assessor the ability to electronically access and alter spatial data related to property valuation.

## **SECTION III: CONTRACTOR RESPONSIBILITIES**

### **A. Responsibilities of Revaluation Contractor**

The Contractor is responsible for the fulfilling all requirements stated in this Request for Proposal, according to the project schedule, and in a professional and satisfactory manner. During the course of this project, the Contractor shall work cooperatively and shall provide any reports, invoices, schedules and other information required by this RFP, or requested by the Assessor.

#### **1. Periodic Status Reports**

The Contractor will submit to the Assessor monthly status reports as well as any work completed that is to be reviewed by the Assessor. The report will contain specifics as to the work completed and the work to be done in the next month. The Assessor will review and evaluate the progress of the project, and will notify the Contractor whether the work performed is satisfactory and timely.

#### **2. Management Plan**

The Contractor is required to provide such plan as required by the Connecticut State Statutes.

## **SECTION IV: VALUATION STANDARDS**

### **Market Approach**

1. The Contractor must describe in detail its particular methods for generating values with the market value approach. The comparative sales approaches, or a statistical modeling approach, are the two preferred techniques. If a statistical modeling approach is used, 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, all adjustment techniques must be described by the Contractor in its proposal.

#### **a. Sales Verification**

The validity of all sales for 2 years prior to 1 October 2012 shall be determined by the Contractor and the Assessor. A complete inspection and measurement check must be made of sold properties to determine the accuracy of the current physical listing. A sales file shall be developed to reflect the property characteristics of the sold property as of the date of sale. These validated sales will be the basis for the comparable sales approach for the residential properties. The Contractor shall develop and provide the Assessor with written documentation for the sales verification effort.

### **B. Cost 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 Borough during the year immediately preceding the 1 October 2012 valuation date.

### **C. Income Approach**

The Contractor shall determine a value for income-producing property by converting anticipated income into a property value. The Contractor shall 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.

### **D. Land Valuation**

The land values will be derived from market sales and/or land residual analysis. The land values will be set by the Contractor and reviewed by the Assessor. In the event of any disagreement between the Assessor and the Contractor, the Assessor shall have the final decision confirming all land values and methods. Both full value and the 490 value, if applicable, shall be calculated by the Contractor.

#### **E. Neighborhood Delineation**

The Contractor, with the assistance and approval of Assessor, will delineate the Borough into valuation neighborhoods. These neighborhoods will be determined by analysis of the market factors needed to select comparable sales for the sales comparable approach to value. Boundaries such as highways, natural, economic conditions and zoning etc. shall be considered.

#### **F. Depreciation Analysis**

The Contractor shall develop, and explain separately, each depreciation on the property record card and/or worksheet (if used). Land values shall be added to the depreciated improvement value. The depreciated replacement cost of each property is to be compared with the value produced via income analysis or sales comparison, and obsolescence guides developed by type of property and location. Analysis should be reviewed with the Assessor and a copy shall be provided at the completion of the project.

### **SECTION V: VALUATION OF REAL ESTATE**

The Contractor will calculate a value estimate for each parcel that will be comprised of a land, building, outbuilding, and total value. The final value shall reflect 70% of fair market value as of 1 October 2012. The Contractor shall compute to the nearest 100 dollars the value of all properties identified above.

#### **A. Residential Properties**

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

The CAMA system will present a summary of the cost approach for a subject and up to five comparable sales, showing the basic inventory information for each. The comparable sales in the same market environment will not merely be 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 physical characteristic (location, size, age, grade, and condition etc.). The sales that 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 descriptions to arrive at an adjusted selling price for each sale.

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

## **B. Commercial Industrial Properties**

The appraisal of income-producing properties relies heavily on an analysis of what the prudent investor would pay for a given property based on the income stream that the property could reasonably be expected to produce. In this regard, the actual income/expense information for each property will be collected and analyzed to arrive at a capitalization rate reflective of the market environment.

The Borough will be responsible for the collection of these income/expense forms, while the Contractor will be responsible for the field verification of this data. The Contractor, subject to the approval of the Assessor, will handle the analysis of the data.

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 will apply the results of the models to individual commercial or industrial properties. The models are used to assign appropriate economic rent and expense information that is keyed to the location of the property, and the allocation of building space for potential or actual use.

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

Capitalization rates shall be developed by type of property and location. When the Assessor has approved capitalization rates and techniques, the Contractor shall perform income approaches using both actual and economic income, and expense data.

## **C. Field Review**

Upon completion of the revaluation, the Contractor shall have a qualified member or members of its staff available to explain the valuations made, and to assist in the settlement of complaints at all Board of Assessment Appeal meetings (excluding Sundays). The Contractor will not be required to attend meetings after the completion of the duties of the Board of Assessment Appeals. 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, any valuation changes made due to data error must be corrected on the property file by the Contractor. The Contractor shall provide the Assessor 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.

#### **D. 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 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 amended from time to time. Further, enclosed with such notice shall be a letter specifying the dates, times, and place of the informal public hearings with an explanation of the appeal process. Such notices and letters shall be subject to the approval of the Assessor. A duplicate copy of all letters sent shall be arranged in alphabetical order and left with the Assessor. Where applicable, a letter shall be enclosed to explain the benefits of and the effect on the new assessment for properties classified as Farm, Forest, or Open Space. The Assessor, prior to its mailings, shall approve said letter.

#### **E. Informal Public Hearings**

1. At a time mutually agreeable following completion of all review work by the Assessor and the Contractor, the Contractor shall hold public hearings so that property owners, or their legal representatives, may appear at specified times to discuss their new assessments with qualified members of the Contractor's staff.
2. The Contractor, in conjunction with recommendations of the Assessors, shall schedule a sufficient number of hearings and provide adequate personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made when warranted.
3. The Contractor shall have an adequate number of days for the informal public hearings, which will 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 Assessor and the Contractor.
4. The Contractor, at his expense, shall mail a notice that reflects the result of the informal hearings; the Assessor must approve this notice prior to mailing. A duplicate copy of the notice shall be submitted to the Assessor.

#### **F. Board of Assessment Appeals**

The Contractor shall have a qualified member or members of its staff available for attendance at any deliberations of the Board of Assessment Appeal meetings, which will be held after the completion of the revaluation, Sundays excluded, but 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 1 October 2012 Grand List, to assist in the settlement of complaints and to explain the valuations made. In the event of appeal to the courts, the Contractor shall furnish a competent witness or witnesses to defend the valuation of the properties appraised, it being understood that the

Contractor shall furnish, at no charge, five days of said witnesses for each court action instituted on the 1 October 2012 Grand List assessments. After the initial five days, a per diem rate of up to \$1000 may be charged. If an action arises to revoke the revaluation of the 1 October 2012 Grand List, the Contractor shall provide competent witnesses to defend the revaluation at a set cost to the Borough.

#### **G. Information**

The Contractor shall give to the Assessor any and all information, including but not limited to, pricing schedules, hearing information etc., necessary pertaining to the revaluation work for a period of one year after completion of the duties of the Board of Appeals on the 1 October 2012 Grand List, without further cost to the Borough.

#### **H. Assessor'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 Assessor'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 municipal assessors and their office staff working in the appropriate phases of this project under the Contractor's supervision.

The Contractor shall submit a reasonable training plan and schedule prior to the commencement of the project.

#### **I. 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. All documentation employed in conjunction with this program, including software programs, shall become the property of the Assessors. 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 1 October 2013. This information, and/or appraisal and/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.

#### **J. Certification**

The Contractor shall meet all requirements set forth in this document; no exceptions and/or amendments may be made unless expressly authorized in writing 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 a successful project completion, the Contractor's work product must meet all certification requirements of the Assessor.

## **SECTION VI: RESPONSIBILITY OF 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, taxable or tax exempt, shall rest with the Assessor.

### **B. Cooperation**

The Assessor, the Borough, and its employees will cooperate with and render reasonable assistance to the Contractor and its employees.

### **C. Items Furnished by the Town**

The Borough shall furnish the following to the Contractor:

#### **1. Maps**

The Assessors will provide one copy of available tax maps and access to electronic maps maintained by Borough departments other than the Assessor. The Assessor will also provide available parcel identification data for each parcel of real property, including at a minimum the following items: all current legal information, i.e. ownership, property location, mailing address, map block-lot number.

#### **2. Land Dimensions**

The Assessor will be responsible for providing accurate lot sizes and total acreage of all pieces of property where the tax maps or present records fail to disclose measurements or acreage.

#### **3. Zoning**

The Town will provide current Town zoning and planning regulations, and zoning maps.

#### **4. Property Transfers**

The Town will notify the Contractor, of transfers and property splits occurring after 1 October 2010. The Contractor will update owner and street property record cards.

#### **5. Data Inventory**

The following data will be given to the Contractor: Owner of record; location of property; deed references; map and lot references; age and date of construction of all buildings, if available; and lot size or amount of acreage; and any other pertinent information.

**6. Building Permits**

Records of all building permits issued during the course of the revaluation project up to October 2012. All such records shall be returned to the Borough.

**7. Mailing Address**

The Assessor will provide the current mailing address of all property owners.

**8. Office Space**

Office space, as available, will be provided to the Contractor to carry out the terms of this contract.

**D. Bid Award**

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



## APPENDIX

### 1. PARCEL COUNT:

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

(Estimated as of 10/01/2011)

Residential Lots	8,257
Excess Acreage	513
Residential Drawings	7,888
Outbuildings	3,631
Condominiums	1,148
Condo Options	0
Commercial Land	303
Commercial buildings	295
Apartments	48
Condominiums	0
Outbuildings	257
Apartment Land	
Industrial Land	82
Industrial Buildings	76
Outbuildings	0
Condominiums	0
Public Utility Land	26
Public Utility Buildings	10
Public Utility Outbuildings	14
Vacant Residential Land	692
Vacant Commercial Land	41
Vacant Industrial Land	8
Vacant Land Outbuildings	
Farm Land	27
Forest Land	40
Open Space	8
Use Assessment Outbuildings	2
<b>Total Taxable Property</b>	<b>10,931</b>
Exempt Properties Improved	86
Exempt Properties Vacant	222

### 2. TOWN DATA

Current Basis of Assessment 70%

Taxable Grand List as of 1 October 2010 = \$ 2,027,434,087

The last revaluation was effective as of 1 October 2007

The 2010 population estimate is 31,872 +/-

## PURCHASING AUTHORITY

**TOWN AND BOROUGH OF NAUGATUCK  
INSTRUCTIONS FOR BIDDERS  
TERMS AND CONDITIONS OF BID**

**BID PROPOSALS**

Bid proposals are to be submitted in a sealed envelope and clearly marked "BID # ---- All prices and notations must be printed in ink or typewritten. No erasures are Bid proposals are to be in the office of the Purchasing Authority, prior to date and time specified, at which time they will be publicly opened.

**RIGHT TO ACCEPT / REJECT**

AFTER REVIEW OF ALL FACTORS, TERMS AND CONDITIONS, INCLUDING PRICE, THE PURCHASING AUTHORITY OF THE TOWN AND BOROUGH OF NAUGATUCK RESERVES THE RIGHT TO REJECT ANY AND ALL BIDS, OR ANY PART THEREOF, OR WAIVE DEFECTS IN SAME, OR ACCEPT ANY PROPOSAL DEEMED TO BE IN THE BEST INTEREST OF THE BOROUGH OF NAUGHTUCK.

**QUESTIONS**

Questions concerning conditions and specifications should be directed in writing to: George Hlavacek Assessors Office, 229 Church St, Naugatuck CT 06770

Inquiries must reference date of bid opening, requisition or contact number, and must be received no later than seven (7) calendar days prior to date of bid opening. Failure to comply with these conditions will result in the bidder waiving the right to dispute the bid specifications and conditions. All responses and/or clarifications to this bid will be posted in the form of an addendum, which will be posted to the Town and Borough of Naugatuck website (<http://www.naugatuck-ct.gov>); it is the responsibility of all bidders to acknowledge any and all addenda with the required bid documents.

**PRICES**

Prices quoted must be firm, for acceptance by the Town and Borough of Naugatuck, for a period of One Hundred and Twenty (120) days. Prices shall include all applicable duties. Bidders shall be required to deliver awarded items at prices quoted in their original bid.

**PERMITS**

The Contractor will be responsible for securing all necessary permits, state and local, as required by the Town and Borough of Naugatuck. The Borough will waive its application and permit fees for Town and Borough of Naugatuck projects.

**PAYMENT PROCEDURES**

No voucher, claim or charge against the Borough shall be paid without the approval of the Fiscal Officer for correctness and legality.

**PAYMENT PERIOD**

The Town and Borough of Naugatuck shall put forth its best effort to make payment within thirty days (30) after delivery of the item acceptance of the work, or receipt of a properly completed invoice, whichever is later. Payment period shall be net thirty days (30) unless otherwise specified.

#### **THE CONTRACTOR**

The Contractor for the work described shall be **thoroughly familiar with the requirements of all specifications**. The submission of a proposal shall be construed as evidence that the Contractor has examined the actual job conditions, requirements, and specifications. Any claim for labor, equipment or materials required, or difficulties encountered, which could have been foreseen had such an examination been carefully made, will not be recognized.

#### **ASSIGNMENT OF CONTRACT**

No contract may be assigned or transferred without the consent of the Purchasing Authority.

#### **AWARD OF BIDS**

Contracts and purchases will be made or entered into with the lowest responsible bidder meeting specifications, except as otherwise specified in the invitation. If more than one item is specified in the invitation, the Town and Borough of Naugatuck reserves the right to determine the low bidder on an individual basis or on the basis of all items included in the Invitation for Bids, unless otherwise expressed by the Town and Borough of Naugatuck

#### **GUARANTEE**

Equipment, materials and/or work executed shall be guaranteed for a minimum period of one (1) year against defective material and workmanship. The cost of all labor, materials, shipping charges and other expenses in conjunction with the replacement of defective equipment, and/or unsatisfactory work, shall be borne by the Contractor.

#### **CATALOGUE REFERENCE**

Unless expressly stated otherwise, any and all reference to commercial types, sales, trade names and catalogues are intended to be descriptive only and not restrictive; the intent is to indicate the kind and quality of the articles that will be acceptable. Bids on other equivalent makes, or with reference to other catalogue items will be considered. The bidder is to clearly state exactly what will be furnished. Where possible and feasible, submit an illustration, descriptive material, and/or product sample.

#### **OSHA**

The bidder will certify all equipment complies with all regulations and conditions stipulated under the Williams-Steiger Occupational Safety and Health Act of 1971, as amended. The successful bidder will further certify that all items furnished under this project will conform and comply with Federal and State

of Connecticut OSHA standards. The successful bidder will agree to indemnify and hold harmless the Town and Borough of Naugatuck for any and all damages that may be assessed against the Borough.

#### **LIFE CYCLE COSTING**

Where applicable, Life Cycle Costing will be used as a criterion for awarding bids. This is a method of calculating total cost of ownership of an item, which may include operation and maintenance expenses, transportation, salvage value, and/or disposal costs.

#### **INSURANCE COVERAGE**

The successful bidder will be required to furnish a Certificate of Insurance naming the Town and Borough of Naugatuck as the additional insured. The insurance is to be suitable Contractor's Liability and Compensation, thereby making the Town and Borough of Naugatuck harmless from all eventualities that may occur relative to this Bid and the resulting purchase order or contract. All applicable Federal, State and local laws, rules and regulations of all authorities having jurisdiction over the locality of the project shall apply to the contract and are deemed to be included herein.

#### **CONFLICT OF INTEREST**

No officer or employee or member of any elective or appointive board, commission or committee of the town, whether temporary or permanent, shall have or acquire any financial interest gained from a successful bid, direct or indirect, aggregating more than one hundred dollars (\$100.00), in any project, matter, contract or business within he/she jurisdiction or the jurisdiction of the board, commission, or committee of which he/she is a member. Nor shall the officer/employee/member have any financial interest, direct or indirect, aggregating more than one hundred dollars (\$100.00) in any contract or proposed contract for materials or services to be furnished or used in connection with any project, matter or thing which comes under his/her jurisdiction or the jurisdiction of the board, commission, committee of which he/she is a member.

#### **SCOPE OF WORK/SITE INSPECTIONS**

The bidder declares that the scope of the work has been thoroughly reviewed and any questions resolved (see above for name and number of individual to contact for questions). If applicable, the bidder further declares that the site has been inspected as called for in the specification (q.v.).

#### **EXCEPTION TO SPECIFICATIONS**

No protest regarding the validity or appropriateness of the specifications or of the Invitation for Bids will be considered, unless the protest is filed in writing with the Purchasing Authority, prior to the closing date for the bids. All bid proposals rendered shall be considered meeting the attached specifications unless exceptions are noted on a separate page dated and signed by the bidder.

#### **UNLESS OTHERWISE NOTED**

It will be assumed that all terms and conditions and specifications will be complied with and will be considered as part of the Bid Proposal.

#### **TAX EXEMPT**

Federal Tax Exemption 06-6002041

Exempt from State Sales Tax under State General Statutes Chapter 219-Section 12-412 Subsection A. No exemption certificates are required and none will be issued.

#### **BID BOND**

The BID BOND furnished, as bid security, must be duly executed by the bidder as principal. It must be in the amount equal to ten percent (10%) of the total estimated bid, as guarantee that, in case the contract is awarded to the bidder, the bidder will, within ten days thereafter, execute such contract and furnish a Performance Bond and Payment Bond. Small businesses may elect to obtain an irrevocable letter of credit or cashier's check in lieu of the Bid Bond. Such surety must also be in an amount equal to at least ten percent (10%) of the total estimated bid.

The successful bidder, within seven (7) business days after notification of award, will be required to furnish Performance and Labor and Material Bond provided by a company authorized to issue such bonds in the State of Connecticut equal to a hundred per cent (100%) of the award.