

A G E N D A N O T E S

Gorham Town Council Regular Meeting

August 4, 2020 – 6:30pm

Remote Zoom Meeting

Public Hearing #1

On Item #2020-8-01

Public hearing to hear comments on the proposed amendments to the Land Use and Development Code and Site Plan review for Hans Hansen Contract Zone (M3, L22.502-507, 22.403)(Admin. Spon.)

Public hearing and order for amendments to the Contract Zone of Hans Hansen, Inc. in south Gorham. This amendment is listed in the agenda and would allow for a variety of residential uses for 55 and over housing that is currently not allowed in the contract zone. Various other conditions are highlighted in the order.

Public Hearing #2 On Item #2020-8-02

Public hearing to hear comments on the proposed amendments to the Land Use and Development Code and Site Plan review for Section 1-11, Roadside Commercial District, to allow self-storage facilities. (Admin. Spon.)

This public hearing and order will amend the LUDC to allow for self-service storage facilities and warehousing facilities in the Roadside Commercial District zone, which is located in the lower Main Street area of Gorham.

Item #2020-8-03

Action to consider adopting a resolution to assist with ending systemic racism. (Councilor Wilder Cross Spon.)

This order will adopt a resolution on systemic racism in Gorham.

Item # 2020-8-04

Action to consider selecting a vendor for a Town-wide revaluation. (Admin. Spon.)

Item #2020-8-04 is the selection of a revaluation vendor for the Town of Gorham. The Town's last revaluation was a partial revaluation that was conducted in house; however, property values have increased so much in the Town that our certified ratio can now only be certified 86%, where we normally should be around 100%. When the certified ratio declines, residents cannot claim 100% of their state exemptions and the town loses a percentage of personal property tax collections. As a result, our assessments are no longer fair and equitable.

Earlier this year, Town staff sent out an RFP for a revaluation. We interviewed the two firms that submitted bids, Vision and KRT Appraisal, just as the COVID-19 pandemic started to take off. The process was put on hold until we were able to get a handle locally on our operations, as well as started to feel more comfortable about having a contractor out representing the Town during a pandemic. Both vendors have agreed to hold their

pricing as a result of the pandemic; however, staff recommend that we cannot delay a Town-wide revaluation indefinitely and should start the process.

As a result of our interviews, staff recommends VISION be approved as the vendor for the revaluation based on their experience, firm size and reputation - despite being a higher cost. Copies of the proposals will be sent to the Council.

Item #2020-8-05

Action to consider approving a request for a qualifications process for a joint facilities inventory study with the Gorham School Department. (Admin. Spon.)

This item is approval of an RFQ and process for hiring a consulting firm to do a town wide facilities study. The idea was crafted by the Capital Improvement Committees of both the School Committee and Town Council prior to the pandemic. \$200,000 is budgeted between the school and Town budgets for this process; however, the Town Council has never formally voted on a study and/or the RFQ process / advertisement, which is attached.

Item #2020-8-06

Action to consider authorizing staff to work with the Gorham School Department to remove dangerous trees between the high school parking lot and Robie Softball Field. (Admin. Spon.)

The Gorham School Department recently requested that the Town approve of removing pine trees between Robie Field and the High School due to them being dangerous and a maintenance problem. An arborist called in confirmed that most, if not all of the trees, could and should be removed. As the idea had been brought forward last year but put on hold, staff is requesting permission from the Town Council before authorizing their removal.

Item #2020-8-07

Action to consider voting on Maine Municipal Association Legislative Policy Committee Appointments. (Admin. Spon.)

This item would be the official vote for Town Manager Ephrem Paraschak and Scarborough Town Councilor Jean-Marie Caterina as delegates to MMA's Legislative Policy Committee. Both individuals have served on the committee representing Senate District 30 for the past three years.

Item #2020-8-08

Action to consider regulating performance standards and locations for Medical Marijuana Caregivers. (Councilor Hartwell Spon.)

This item would instruct the Ordinance Committee to create and review standards and permitted locations for Medical Marijuana Caregivers in the Land Use & Development Code and report back to the Town Council.

Item #2020-8-09

Action to consider forwarding to the Planning Board amendments to the Land Use & Development Code's standards on Clustered Residential Development. (Ordinance Committee Spon.)

This item forwards an Ordinance Committee recommendation to the Planning Board that amends the LUDC's standards on Clustered Residential Development. A memo from staff is attached.

KRT Appraisal

191 Merrimack St, Suite 701
Haverhill, MA 01830
Tel (877) 337-5574
Fax (978) 914-7201

February 3, 2020

Ephrem Paraschak
Town Manager
75 South Street, Suite 1
Gorham, ME 04038

Price Proposal

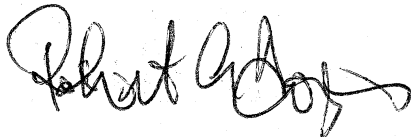
Dear Mr. Paraschak:

KRT (KRT) is pleased to submit a proposal in response to your Request for Proposals for the Town of Gorham, Maine. KRT will provide all services outlined in the RFP while conforming to all Maine State Laws.

Based on the specifications listed in the RFP, the total cost for a Full Revaluation is Three Hundred Ten Thousand Dollars **(\$310,000)**. This includes all services described in KRT's Statement of Services with all products delivered by August 1, 2021. This price includes ten (10) days for defense of values for abatement or Board of Assessment Review at no additional cost, any time requested above the ten days will be billed at One Hundred Dollars per Hour **(\$100.00/Hour)**. The price per parcel for properties in excess of 7,600 parcels is Forty Five Dollars per Parcel **(\$45.00/Parcel)**.

We look forward to the opportunity to discuss this proposal with you. If you have any questions or need more information, please do not hesitate to call.

Sincerely,



Robert Tozier
Vice President
KRT Appraisal
rob_tozier@krtappraisal.com
www.krtappraisal.com

BID PROPOSAL DOCUMENT

This document must be included in the bid package, clearly marked "BID PROPOSAL – PROPERTY REVALUATION"

<u>Service</u>	<u>Total Price</u>
Revaluation of all real property	\$ <u>310,000</u>
Internet Services during the revaluation public disclosure period	\$ <u>Included</u>
Internet Services after revaluation (if applicable)	\$ <u>N/A</u>
Any other services available	\$ <u>N/A</u>
Additional support (if applicable)	\$ <u>N/A</u>

Bids shall include the following information (Indicate with a (X) in the left-hand column that they have been included in your response):

- | X | No. | Item |
|-------------------------------------|------------|---|
| <input checked="" type="checkbox"/> | 1. | Name and telephone number of person(s) to be contacted for further information and clarification. |
| <input checked="" type="checkbox"/> | 2. | Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number. |
| <input checked="" type="checkbox"/> | 3. | Indication of number of years engaged as a company, corporation, partnership or individual specializing in governmental tax revaluation services. |
| <input checked="" type="checkbox"/> | 4. | Name of project supervisor to be assigned to this project, along with his/her resume. |
| <input checked="" type="checkbox"/> | 5. | Time schedule filled out according to the Contract Specifications. |
| <input checked="" type="checkbox"/> | 6. | Staged fee payments filled out as listed in Contract Specifications. |
| <input checked="" type="checkbox"/> | 7. | Rate per parcel of properties in excess of 100% filled out, as listed in the Contract Specifications. |

Town of Gorham, Maine



Proposal for Full Revaluation

KRT Appraisal



ORIGINAL

Town of Gorham, Maine



Proposal for Full Revaluation

KRT Appraisal

191 Merrimack St, Suite 701
Haverhill, MA 01830
Tel: (877) 337-5574
Fax: (978) 914-7201

February 3, 2020

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February 3, 2020

Ephrem Paraschak
Town Manager
75 South Street, Suite 1
Gorham, ME 04038

Letter of Transmittal

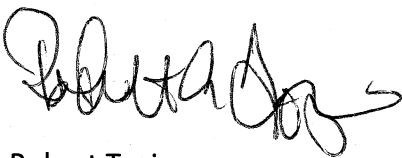
Dear Mr. Paraschak:

The following report is submitted in response to your Request for Proposals (RFP), for the Town of Gorham, Maine. This proposal will remain in effect for ninety (90) days from its opening. KRT has read the RFP and fully understands the scope of services requested.

This comprehensive proposal will serve to provide the Town with our qualifications and experience in providing similar services in the past. KRT has the capability to perform the services requested in the RFP while meeting all established deadlines and quality expectations. As a small company, KRT's upper management will be solely responsible for all aspects of the valuation process. Our experience, education, familiarity with Vision CAMA and proven track record make KRT an excellent candidate to complete the Full Revaluation.

KRT is pleased to provide this proposal and look forward to the opportunity to discuss it with you. Please do not hesitate to call if there are any questions or if more information is needed.

Sincerely,



Robert Tozier
Vice President
KRT Appraisal
Office: (877) 337-5574
Fax: (978) 914-7201
rob_tozier@krtappraisal.com
www.krtappraisal.com

EXECUTIVE SUMMARY

KRT Appraisal has read the RFP and fully understands the services requested for the Full Revaluation for the Town of Gorham, Maine. Below is a brief list of services to be provided:

- Hold a start-up meeting with the Assessor;
- Measure and list all properties;
- Take and load a new image for all improved properties;
- Provide data entry at every stage of the revaluation;
- Analyze all of the qualified sales for the time period of two (2) years prior to the assessment date of April 1, 2021;
- Update all land and building tables as dictated by sales analysis;
- Review one hundred percent (100%) of the properties in the field;
- Conduct the informal hearings and consider all credible information provided;
- Post old and new assessed values on our website as a taxpayer resource;
- KRT Appraisal shall implement a public relations program designed to educate the Board, Assessor, and general public on the phases of the revaluation as well as the valuation results from the market analysis;
- Submit to the Town a Uniform Standards of Professional Appraisal Practice (USPAP) compliant report detailing the methodology used and the results from the revaluation.

KRT Appraisal offers a variety of mass appraisal, consulting, and assessing services to its clients. Some of these services include:

- Data Collection
- Digital Imaging
- Building Permit Review
- Consulting
- Abatement Review
- Full Revaluations
- Valuation Updates
- Contract Assessing

KRT Appraisal has extensive hands-on experience using the Appraisal Vision CAMA Software package and is familiar with the latest Version 8. KRT Appraisal's upper management have a widespread knowledge of cost modeling, table maintenance, and advanced report writing. KRT Appraisal has completed over forty revaluations using the Vision Appraisal CAMA System.

STATEMENT OF SERVICES
FULL REVALUATION

1) PROFILE OF GORHAM, MAINE

1.1: Gorham is a town in Cumberland County, Maine, United States. The population was estimated to be 17,450 in 2017. It is part of the Portland–South Portland–Biddeford, Maine metropolitan statistical area. Gorham has approximately 7,600 parcels included within the scope of this project.

2) SCOPE OF THE PROJECT

2.1: Subject to the terms and conditions of this Statement of Services, KRT shall measure, list and update the value for all classes of property located within the Town of Gorham as listed in Section 1 while conforming to Maine State Law and the guidelines set forth in determining “Just Value”. The determined “Just Value” will be reflected as of April 1, 2021.

2.2: “Just Value” defined: “In the assessment of property, assessors (Board of Selectmen) in determining just value are to define this term in a manner which recognizes only that value arising from presently possible land use alternatives to which the particular parcel of land being valued may be put. Assessors (Board of Selectmen) must consider the effect upon value of any enforceable restrictions to which the use of the land may be subjected. Restrictions shall include, but are not limited to, zoning restrictions limiting the use of the land, subdivision restrictions, and any recorded contractual provisions limiting the use of the lands. The just value of land is deemed to arise from and is attributable to legally permissible use or uses only.” **(36 MRSA §701-A)**

2.3: KRT believes the most successful revaluations are completed when there is a certain level of involvement from the Assessor. It is vital to have good communication between the Revaluation Company and the Assessor. KRT is hopeful that the Assessor is willing to be involved as much as possible.

2.4: For purposes of this proposal, the scope will be divided into five (5) main groups of project requirements, each extensively detailed. The five (5) main groups are as follows: Data Collection, Analysis, Field Review, Informal Hearings, and Reporting.

A) Data Collection

2.A.1: Before starting the revaluation, KRT shall meet with the Town Assessor to review the Data Collection manual to ensure that all data will be collected according to the Town’s established specifications.

2.A.2: KRT will conduct an on-site exterior measurement and interior inspection of all properties within the Town. All KRT employees will have proper identification (KRT Badge

or Town ID) as well as a letter from the Town with a vehicle description and purpose for visiting the property. KRT will mail a letter requesting an appointment if the owner is not home after two (2) visits. KRT will supply the Town with a list of all properties where an interior inspection was not completed.

2.A.3: KRT will mail an informational postcard to each property to be visited explaining the reason for the upcoming visit by a KRT Data Collector.

2.A.4: KRT will verify all of the information on the property record card. This includes all construction detail, sketch measurements, year built, property condition, outbuildings, extra features, legal information, sale conditions, and land detail information. A visit history code with the employee's initials and date will be added for each visit to the property.

2.A.5: KRT will input all data changes at each stage of the revaluation into the Vision CAMA system.

2.A.6: KRT will send out callback letters to each property owner where an interior inspection was not completed during the initial visit. KRT will take phone calls from letters sent and schedule callback appointments using a schedule convenient for the Town and the taxpayers.

2.A.7: KRT will update the Town's image file by taking a new photo of all improved properties within the Town. This photo will be at least six megapixels and loaded into the CAMA System.

B) Analysis

2.B.1: KRT will analyze all of the qualified sales for the time period of two (2) years prior to the assessment date of April 1, 2021. All strata's tested (style, size, sale price, age, sale date, neighborhood, and grade) will be within five percent (5%) of the desired median for all classes of property.

2.B.2: KRT will compute, to the nearest One Hundred Dollars (\$100), the value of all properties within the scope of this Statement of Services.

2.B.3: Land values will be established for all properties within the Town by analyzing vacant land sales for a period of two (2) years. If there is insufficient data, a land residual technique will be utilized. Factors to be considered in land valuation shall include lot size, neighborhood, zoning restrictions, shape, topography and all other factors deemed relevant after further investigation.

2.B.4: Residential building values will be generated utilizing a "market adjusted" cost approach. To achieve this, a cost analysis will be done to determine the Replacement Cost New (RCN) for all building types within the Town. Factors to be considered include the style,

grade or quality, size, number of bedrooms and bathrooms, and other various amenities that affect value. Once the RCN is established, an analysis of the physical condition of the property relative to its age will be conducted. The resulting depreciation tables will calculate a depreciation percentage. Once the depreciated building value is established, it is added to any outbuildings and the land value to come up with the overall market value. All values and tables are generated directly from the sales analysis.

2.B.5: Commercial values will be generated utilizing both the “market adjusted” cost approach and the income approach. KRT will make a thorough analysis of income and expense data reported on the Income and Expense forms returned to the Town as well as cap rates using a current publication of the Investor’s Survey. Information gathered such as income/rents, vacancy, and expenses will be compiled in the income tables and used to determine the value for the income approach. This value is then reconciled to within ten percent (10%) of the “market adjusted” cost value. KRT shall be responsible for costs associated with mailing Income and Expense forms.

2.B.6: KRT shall update all tables (building, land, OBXF, depreciation and income) as well as the cost modeling as dictated by the sales analysis.

C) Field Review

2.C.1: KRT will review all of the sale properties in the field. The personnel conducting this phase of the program will have a minimum of five (5) years of mass appraisal experience and be supervised by a Certified Maine Assessor (CMA). KRT will subsequently review all of the properties in the field to check the field card for data and valuation accuracy.

2.C.2: It is understood that KRT will have the ability to exercise good judgment in making final value estimates. KRT, in order to ensure valuation accuracy and consistency, will have no more than three (3) field review appraisers work in the Town.

2.C.3: KRT shall review the current delineation of all neighborhoods and make changes based on data extracted during the sales analysis.

D) Informal Hearings

2.D.1: KRT in conjunction with the Town, will develop an Assessment Change Notice. The notice will, at a minimum, contain the following information: brief description of the assessment process, how to appeal, the phone number to call to schedule a hearing, parcel MBLU, parcel ID number, property location, owner’s address, and the total parcel value.

2.D.2: KRT will be responsible for mailing the notice and all associated postage. KRT will take the phone calls and schedule all hearings on a schedule approved by the Town. Hearings will take place at a convenient location designated by the Town.

2.D.3: KRT will conduct the informal hearings. Skilled personnel with past hearing experience will be available for all work relating to the hearings and other taxpayer inquiries. A schedule will be available at the hearings to re-inspect properties that warrant a site visit in order to consider the requested change.

2.D.4: KRT will consider all credible information brought forth by a taxpayer at a hearing and make the necessary changes. KRT will look for any patterns to see if any particular market areas or groups need to be reviewed as a result of information provided by the taxpayers.

2.D.5: KRT will hold hearings for a period of at least ten (10) days. KRT can offer phone hearings to accommodate those who are unavailable to meet during the day.

2.D.6: KRT will send all taxpayers who came in for an informal hearing a final letter notifying the taxpayer of their post-hearing value. This letter will briefly explain the taxpayer's next course of action if they are still displeased with their assessment.

E) Reporting/Defense

2.E.1: KRT will submit to the Town one (1) assessment manual titled "*Assessment Manual, for the Town of Gorham, Maine*" which contains procedures, analysis, and standards, as well as classifications for all types of property. Delivery of this final USPAP Manual will be made by October 31, 2021.

2.E.2 KRT will post on our website a value report to include the old and new assessments along with parcel identifiers for each parcel included within the scope of this project.

2.E.3: KRT will provide ten (10) days to be used in the defense of the assessments either locally through the abatement process or formally for any subsequent appeal to any Board.

3) PUBLIC RELATIONS

3.1: KRT will take measures at all stages of the project to foster and maintain good relations with the Town of Gorham's taxpayers, Town Officials, Agents, and Town Employees.

3.2: KRT, if requested by the Town, will hold at least one (1) informational meeting for the Gorham taxpayers. This meeting(s) will serve to inform and educate the public at large of the following points:

- a) Necessity of a revaluation
- b) Progress and status of the project
- c) Goals of the project
- d) Roles of the Town and KRT
- e) Qualifications of KRT
- f) Necessity of taxpayer cooperation

g) On-going nature of completed system

3.3: KRT shall make available the project supervisor for all speaking endeavors and meetings with various groups as a means of establishing and promoting understanding and support for the Full Revaluation program. KRT shall supply visual aids and other media at its disposal to this end. All prepared releases shall be submitted to the Town for review prior to public dissemination.

4) PROGRESS AND CONTROL

4.1: It is recognized that the plan for operation may require alteration from time to time and the Town shall not unreasonably require strict adherence to the plan, however, any change in starting date or completion date must be requested in writing by KRT and must be approved by the Town. Below is the proposed revaluation timeline:

<u>Task</u>	<u>Start Date</u>	<u>Completion Date</u>
Start-Up Meeting	03/23/20	03/27/20
Public Relations	On-going	
Data Collection/Callbacks	04/06/20	03/26/21
Data Entry	04/13/20	04/02/21
Field Review Sales	04/05/21	04/16/21
Update Cost Modeling	04/19/21	05/07/21
Land and Building Pricing	04/19/21	05/07/21
Update Tables	04/19/21	05/07/21
Field Review	05/10/21	05/28/21
Final Valuations	05/31/21	06/18/21
Town Review	06/21/21	06/25/21
Impact Notices	06/28/21	07/02/21
Informal Hearings	07/05/21	07/16/21
Hearing Review	07/19/21	07/23/21
Final Products Delivered	07/26/21	07/30/21
Project Completion		08/01/21

4.2: The Town may grant an extension of the completion date not to exceed thirty (30) days to conclude any additional work required under the terms herein specified with respect to alterations, additions, subdivisions, where circumstances beyond KRT's control, and not due to its own acts or omissions, tend to delay completion of the project. Such extension shall only be made after submission of a written request by KRT stating the reasons for an extension request.

4.3: KRT shall provide weekly status reports during the Data Collection phase of the project. KRT shall provide monthly status reports during the valuation phase of this project. Each report will provide percent complete by task to ensure that the project is being completed at a pace satisfactory to the Town.

4.4: The Town shall charge KRT a penalty of \$100 per calendar day for failure to turn over all deliverables required by the contract deadline date of August 1, 2021.

5) EQUIPMENT AND SUPPLIES

5.1: The Town will provide KRT with the following equipment and supplies available for the duration of the project:

- a) Adequate office space with furniture and chairs;
- b) Access to a computer and printer;
- c) Access to a telephone for local calls;
- d) Two (2) sets of current tax maps as well as the most current zoning map;
- e) Remote access to a terminal with the Vision CAMA System loaded.

5.2: The Town shall cooperate with KRT by providing the following from current records if requested:

- a) All available building permit information
- b) All available zoning information
- c) All available ownership records
- d) All available land classification information
- e) All available sales data
- f) Prior assessed values

The Town shall further assist KRT in providing or making available any information it possesses or is conveniently available that may be required for the execution of the project.

5.3: KRT will be responsible for delivering the following to the Town:

- a) Database in good working order with updated values and all sales loaded into the sales file;
- b) A neighborhood map (map provided by the Town);
- c) A USPAP manual detailing the grading system and methodology to be used on this project.

5.4: All records, computations, maps, manuals, cards, computer discs and other electronic data, photographs, schedules, tables, reports, etc. of KRT in respect to any work related to the project shall be left in custody and become property of the Town.

6) PAYMENT SCHEDULE

6.1: In addition to monthly status reports, KRT will submit an invoice based on the portion of work completed during the preceding month. The invoice shall include the percentage relationship of all work completed thus far in relation to the total contract, the total payment

previously made, the payment requested for the month, and the total payment requested to date.

6.2: The Town may require KRT to submit substantiating production reports from the project manager prior to making any payments on the contract.

6.3: The Town is required to make timely percentage payments on the contract to KRT, within thirty (30) days, equal to eighty percent (80%) of the contract amount represented by work completed during the month as finally determined by them.

6.4: If the Town determines that KRT's invoice is inaccurate, the Town shall give written notice specifying exactly which portion(s) is found to be unsatisfactory. KRT shall make every effort to correct the inaccuracy. The Town shall retain the right to delay payment, only for the specified item(s), until said item(s) is resolved to the satisfaction of both the Town and KRT. Upon satisfactory resolution, the Town shall pay KRT said amount due.

6.5: The twenty percent (20%) retainage shall be released using the following schedule:

- 1) Fifteen Percent (15%) after the final hearing notices have been mailed;
- 2) Three Percent (3%) within thirty (30) days after a compliant USPAP Manual has been delivered to the Town;
- 3) Two Percent (2%) within thirty (30) days reviewing and making recommendations on the ten (10) days of included defense of values.

7) INSURANCE

7.1: KRT, working as an independent contractor, shall carry and maintain in force professional and general liability insurance, as well as workmen's compensation insurance. KRT shall save the Town, its agents, servants, and employees harmless, at KRT's sole expense, to any liability or legal proceeding occurring as a result of KRT's actions or omissions, including injury, death, property damage, or any associated expense(s) including costs of defense and reasonable attorney's fees.

7.2: KRT's general liability policy has limits of two million dollars (\$2,000,000) per occurrence and four million dollars (\$4,000,000) aggregate. This policy provides comprehensive coverage against claims for personal injury, death, or property damage.

7.3: KRT's professional liability policy has limits of one million dollars (\$1,000,000) per occurrence and one million dollars (\$1,000,000) aggregate.

7.4: All of KRT's employees shall carry adequate automobile insurance to provide comprehensive coverage of one million dollars (\$1,000,000) each person/each occurrence for bodily injury liability.

7.5: All insurance documentation shall be made available within thirty (30) days if awarded a contract.

8) TERMINATION

8.1: **Force Majeure:** Neither party shall be liable to the other or deemed to be in breach under the agreement for any failure to perform including, without limitation, a delay in rendering performance due to causes beyond its reasonable control, such as an order, injunction, judgment, or determination of any Court of the United States, or the State of Maine, an Act of God, war, civil disobedience, extraordinary weather conditions, labor disputes, shortages or fluctuation in electric power, heat, light, or air conditioning. Dates or time of performance will be extended automatically to the extent of such delays provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay. It is agreed, however, that since the performance dates of this contract are important to the implementation of ongoing property value update programs, continued failure to perform for periods aggregating sixty (60) or more days even for causes beyond the control of KRT, shall be deemed to render performance impossible, and the Town shall thereafter have the right to terminate this agreement in accordance with the provisions of the section entitled, "Termination."

8.2: Subject to the provisions of the section entitled "**Force Majeure**", if KRT shall fail to fulfill in a timely and satisfactory manner its obligations under this agreement, or if KRT violates any covenants, conditions, or stipulations of this agreement, which failure or violation shall continue for twenty-one (21) business days after written notice of such failure or violation is received by KRT, then the Town shall thereupon have the right to terminate this agreement by giving written notice to KRT of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination.

9) ASSIGNMENT OF CONTRACT

9.1: KRT shall not assign or in any way transfer any interest in this agreement without the prior written consent of the Town, provided however, that claims for money due or to become due to KRT from the Town hereunder may be assigned to a bank, trust company, or other financial institution without such consent, so long as notice of any such assignment is furnished promptly to the Town, any such assignment shall be expressly made subject to all defenses, set offs, or counterclaims which would have been available to the Town against KRT in the absence of such assignment.

10) PERFORMANCE BOND

10.1: In-Lieu of a performance bond, KRT Appraisal requests the Town hold an additional ten percent (10%) retainage for a total of twenty percent (20%).

KRT APPRAISAL **COMPANY PROFILE**

Located in Haverhill, Massachusetts, and founded in April 2010, KRT provides superior Revaluation services for municipalities throughout New England. KRT brings a fresh and innovative approach to Revaluation services by listening to the client's needs and working with them to produce a high quality product. Our goal is to exceed the expectations of every client by offering competitive pricing, on time project completion, and outstanding customer service. Typically, we are on-location handling client contact and providing technical training and support to the office staff. Our associates are distinguished by their technical expertise combined with their hands-on experience, thereby ensuring that our clients receive the most effective and professional service. KRT offers a wide variety of services. These services include:

- ❖ Data Collection
- ❖ Digital Imaging
- ❖ Building Permit Review
- ❖ Field/Desk Reviews
- ❖ Data Quality Studies
- ❖ Consulting
- ❖ Abatement Review
- ❖ Full Revaluations
- ❖ Statistical Updates
- ❖ Personal Property Listing and Valuation
- ❖ Contract Assessing

KRT believes in harnessing technology, which is why we give our associates the tools and training they need to get the project done in the most effective manner. We pride ourselves on our proven track record for administering multiple projects. This is due to successfully managing team members to utilize all the technology that is available to them.

Over the last decade or so, many Municipal budgets have been strained. This has dramatically changed the way local governments operate. In attempting to be more fiscally conscious, all budgeted items have come under great scrutiny. This is especially evident in the area of appraisal and assessment administration. KRT Appraisal was created with this in mind. As a small company, KRT Appraisal can offer more hands-on services at competitive prices.

QUALIFICATIONS

1) PROJECT STAFFING

KRT will be responsible for the supervision of all phases of the revaluation and will employ the following organizational structure to manage the project:

Title	Name	Years of Experience
Project Manager, Appraiser	Ken Rodgers, CMA	28 Years
Appraiser	Rob Tozier, CMA	19 Years
Appraiser	Kevin Leen, CMA	30 Years
Data Collector	Doug Rollins	5 Years
Data Collector	Lindsay Waller, CMA	2 Years

Resumes of each KRT associate are provided in Section F. Each resume contains prior work experience, positions held, responsibilities of each position, and educational and professional affiliations for each individual. No KRT employee working on this project shall be under the age 18 years old.

Proposed changes in the project staffing plan will be submitted to the Town, in writing, for review and approval. The Town shall notify KRT of the acceptance or rejection of any staff substitutions within ten (10) business days of the receipt of the proposed changes. The Town shall reserve the right to make final determination regarding the acceptability of the proposed personnel changes.

2) CAMA SYSTEM

KRT has extensive hands-on experience using the Appraisal Vision CAMA Software package. KRT's upper management have a widespread knowledge of cost modeling, table maintenance, and advanced report writing. KRT has completed over forty revaluations using the Vision Appraisal CAMA System.

3) REFERENCES/CURRENT ASSIGNMENTS

KRT's associates have completed dozens of revaluations/updates over the past five years, most of which utilizing Vision CAMA Software. KRT's associates have valued some of the most diverse communities in New England, including many similar waterfront communities. The following page contains a complete list of those projects, KRT's current commitments and also letters of recommendation from recent clients.

KRT Appraisal Current/Completed Work Over Five Years

<u>City/Town</u>	<u>Approx Size</u>	<u>Services</u>	<u>Year</u>	<u>Contact</u>	<u>Phone Number</u>
Brentwood, NH	1,850	Full Revaluation	Current	Karen Clement	(603) 642-6400
Littleton, NH	3,400	Statistical Update	Current	Andrew Dorsett	(603) 444-3996
Milford, NH	200	Data Collection 200 C/I Parcels	Current	Marti Noel	(603) 249-0615
Agawam, MA	398	Cyclical Data Collection	Current	Sam Konieczny	(413) 726-9704
Baldwin, ME	1,100	Full Revaluation	Current	Ben Thompson	(207) 699-2475
Rockland, ME	3,700	Statistical Update	Current	Roxy LaFrance	(207) 594-0303
Dunstable, MA	225	Cyclical Data Collection	Current	Vicki Tidman	(978) 649-4514
Lyman, ME	2,800	Full Revaluation	Current	Alex Konczal	(207) 247-0645
Grantham, NH	2,500	Statistical Update	Current	Melissa White	(603) 863-6021
Rindge, NH	2,800	Cyclical Revaluation (2018-2020)	Current	Dave DuVernay	(603) 899-5181
Amherst, NH	5,000	Contract Assessor/Cyclical Data Collection	Current	Michele Crowley	(603) 673-6041
Belmont, NH	4,300	Contract Assessor	Current	Jeanne Beaudin	(603) 267-8300
Berlin, NH	4,600	Contract Assessor/Cyclical Data Collection	Current	James Wheeler	(603) 752-7532
Bethlehem, NH	2,200	Contract Assessor	Current	April Hibberd	(603) 869-3351
Hudson, NH	2,073	Data Collection	Current	Jim Michaud	(603) 434-7530
Gorham, NH	1,700	Contract Assessor/Cyclical Data Collection	Current	Michelle Lutz	(603) 466-3322
Kingston, NH	3,150	Contract Assessor/Cyclical Revaluation	Current	Susan Ayer	(603) 642-3342
Grantham, NH	2,500	Contract Assessor	Current	Melissa White	(603) 863-6021
Harpwell, ME	4,500	Assessing Consultant	Current	Debbie Turner	(207) 833-5771
Rindge, NH	2,800	Contract Assessor	Current	Dave DuVernay	(603) 899-5181
Strafford, NH	3,500	Contract Assessor/Cyclical Data Collection	Current	Ellen White	(603) 664-2192
Troy, NH	1,200	Contract Assessor	Current	William T. Matson	(603) 242-7722
Warren, NH	1,050	Contract Assessor	Current	Board of Selectmen	(603) 764-7705
Scarborough, ME	9,000	Residential Full Revaluation	2019	Larissa Crocket	(207) 730-4149
Milford, NH	5,500	Residential Statistical Update	2019	Marti Noel	(603) 249-0615
Hudson, NH	2,250	Cyclical Data Collection	2019	Jim Michaud	(603) 434-7530
Belmont, NH	4,300	Cyclical Revaluation	2019	Jeanne Beaudin	(603) 267-8300
Claremont, NH	5,500	Cyclical Data Collection	2018	Ryan McNutt	(603) 542-7004
Hampden, MA	2,400	Statistical Update	2018	Carolyn Reed	(413) 566-2151
Hooksett, NH	6,000	Statistical Update	2018	LeeAnn Moynihan	(603) 268-0003
Littleton, NH	3,400	Statistical Update	2018	Andrew Dorsett	(603) 444-3996
Longmeadow, MA	6,000	Statistical Update/Contract Assessor	2018	Lawrence Rubin	(413) 565-4115
Nashua, NH	28,500	Statistical Update	2018	Kim Kleiner	(603) 589-3040
Scarborough, ME	750	C/I Full Revaluation	2018	Larissa Crocket	(207) 730-4149
Newburyport, MA	400	Data Collection	2018	Dave Glynn	(978) 465-4403
Bethlehem, NH	2,300	Statistical Update	2018	April Hibberd	(603) 869-3351
Nantucket, MA	9,500	C&I Interim Update, Building Permits	2018	Debbie Dilworth	(508) 228-7200
Troy, NH	1,200	Statistical Update	2018	Christina Perez	(603) 242-7722
Brunswick, ME	9,500	Full Revaluation	2017	Cathy Jamison	(207) 725-6650
Camden, ME	4,000	Statistical Update	2017	Kerry Leichtman	(207) 236-3353
Claremont, NH	5,500	Assessing Consultant	2017	Marlene Jordan	(603) 542-7004
Danvers, MA	300	Cyclical Data Collection	2017	Steve Poulos	(978) 777-0001
Gorham, NH	1,700	Contract Assessor/Cyclical Data Collection	2017	Michelle Lutz	(603) 466-3322
Gorham, NH	1,700	Statistical Update	2017	Michelle Lutz	(603) 466-3322
Stow, MA	3,000	Cyclical Data Collection	2017	Kristen Fox	(978) 897-4597
Amherst, NH	5,400	Statistical Update	2016	Michele Crowley	(603) 673-6041
Charlestown, NH	2,500	Statistical Update	2016	Patricia Chaffee	(603) 826-4400
Goffstown, NH	4,000	Cyclical Data Collection	2016	Scott Bartlett	(603) 497-8990
Keene, NH	6,600	Residential Update	2016	Dan Langille	(603) 352-2125
Laconia, NH	600	Commercial Update	2016	Deborah Derrick	(603) 527-1268
Melrose, MA	427	Full Commercial M&L	2016	Chris Wilcock	(781) 979-4103
Milford, NH	5,500	Statistical Update	2016	Marti Noel	(603) 249-0615
Milford, NH	5,500	Data Collection 1,500 Parcels	2016	Marti Noel	(603) 249-0615
Nantucket, MA	9,500	C&I Interim Update, Building Permits	2016	Debbie Dilworth	(508) 228-7200
Newburyport, MA	5,700	Cyclical Data Collection 1,300 Parcels	2016	Dan Raycroft	(978) 465-4403
Salem, NH	12,700	Statistical Update	2016	Norm Pelletier	(603) 890-2018
Strafford, NH	3,500	Statistical Update	2016	Ellen White	(603) 664-2192
Warren, NH	1,050	Statistical Update	2016	Board of Selectmen	(603) 764-5780
Yarmouth, ME	3,700	Statistical Update	2016	Renee Lachapelle	(207) 699-2475

KENNETH J. RODGERS

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

04/10- Present

President/Project Director - Responsible for the overall operations of the appraisal company. Duties include budgeting, marketing, payroll, and management of all appraisal operations. Also responsible for planning, implementing and running revaluation projects for municipalities. Specific duties include the mass appraisal of residential, commercial, industrial, and personal property accounts. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings and all reporting requirements as they relate to project certification.

Vision Appraisal Technology, Northboro, MA

01/07-04/10

District Appraisal Manager – Responsible for planning, implementing, and supervising revaluation projects for various municipalities. Specific duties include supervising project managers, appraisal staff and data collectors on multiple mass appraisal projects. Duties include public relations, statistical analysis and model calibration, and defense of values.

1/01- 12/06

Project Manager - Responsible for planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential, commercial, industrial, and personal property accounts. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings and all reporting requirements as they relate to project certification.

Assessing Department, Town of Auburn, MA

04/96- 01/01

Chief Assessor - Responsible for the appraisal and assessment of 6,800 taxable residential, commercial, industrial, and personal property accounts with an assessed value in excess of 1 billion dollars.

Responsible for the daily operations of the Assessing Department. Specific duties include budgetary planning, public relations, new growth, taxpayer inquire and appeal, testifying on behalf of the Board of Assessors at hearings before the Appellate Tax Board, preparation of the tax rate information as well as the annual Classification Hearing, and providing leadership, guidance, and direction to the staff.

Responsible for the Department of Revenue certification procedures. Specific duties include revaluation implementation, measuring and listing properties, sales verification, data quality studies, statistical analysis, residential modeling and calibration, sales ratio studies, and all reporting documentation for the Department of Revenue.

Assessing Department, Town of Northborough, MA

07/98- 06/01

Part-time Board Member – Responsibilities include weekly Board of Assessor meetings, abatement inspections, voting on abatements and exemptions, and other duties specific to the overall operation of the Assessor's Office.

PROFESSIONAL DESIGNATIONS AND CERTIFICATIONS:

Massachusetts Accredited Assessor (MAA) inactive

Certified Maine Assessor-Level 4(CMA-4)

Certified Assessor Supervisor, Department of Revenue Administration, New Hampshire

Certified Project Supervisor, Department of Taxes, State of Vermont

EDUCATION, MILITARY AND APPRAISAL COURSES:

United States Marine Corps, Honorable Discharge
Haverhill High School

International Association of Assessing Officers/McKissock:

Expert Witness Testimony for Appraisers
Appraisal of Assisted Living Facilities
Marshall & Swift Residential
Marshall & Swift Commercial
Depreciation Analysis
Appraising Single Tenant Distribution Centers
Appraising Self-Storage Facilities
Tax Policy
Principles and Techniques of Cadastral Mapping
Mass Appraisal of Residential Properties
Assessment Administration
Income Approach to Value
Fundamentals of Mass Appraisal
Fundamentals of Real Property Appraisal
2018-2019 USPAP Update
Fundamentals of Assessment Ratio Studies
Site Analysis
Understanding Real Property Appraisal

Massachusetts Association of Assessing Officers:

Demonstration Appraisal Report Writing
Principles of Assessment Procedure
Assessment Administration, Department of Revenue
Personal Property Auditing

Other Related Courses and Seminars:

New Hampshire Statues Course 1 and 2
Multiple Regression Analysis, SPSS
Into to Statistics, SPSS
Exterior Construction Components, MBREA
Project Management, AMA
Geographical Information Systems, IAAO
Appraising 1-4 Family Properties; J.M.B. Real Estate Academy
USPAP, J.M.B. Real Estate Academy
Course 1A; Massachusetts Board of Real Estate Appraisers

Expert Witness

Massachusetts Appellate Tax Board
New Hampshire Board of Land and Tax Appeals
Maine Board of Assessment Review
Maine County Commissioners

ROBERT A. TOZIER

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

04/2010- **Vice President/Project Manager**

Present Responsible in part for all aspects of daily corporate operations including payroll, budgeting, marketing, customer support, and company growth. Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and all reporting requirements as they relate to project certification.

VISION APPRAISAL TECHNOLOGY, NORTHBOROUGH, MA

10/2006- **Project Manager**

4/2010 Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and all reporting requirements as they relate to project certification.

05/2003- **Staff Appraiser/Assistant Project Manager**

9/2006 Review residential and commercial properties for revaluation purposes. Responsibilities include delineating neighborhoods and setting factors for land based on market data, review and analyze income and expense reports for commercial and industrial properties, market research and formulation of cap rates, commercial and industrial review and reconciliation.

COLE LAYER TRUMBLE, TOLLAND, CT

12/2000- **Appraiser Trainee**

5/2003 Worked on Revaluations in over twenty cities and towns across New England and Nation-wide. Duties included residential and commercial listing, quality control, permit pick-ups, sales verification, pre-review, final review, informal hearings, and training/supervising data collectors in the field.

EDUCATION

Keene State College, Keene, NH (1996-2001)

B.S. Health & Fitness

American International College, Springfield, MA (1995-1996)

Physical Therapy Undergraduate Coursework

APPRAISAL EDUCATION/CERTIFICATIONS

International Association of Assessing Officers

- 1) Fundamentals of Real Estate Appraisal (2002)
- 2) NH State Statutes Part 1 (2010)
- 3) NH State Statutes Part 2 (2010)
- 4) Mathematics for Assessors (2012)
- 5) Site Analysis (2012)
- 6) Assessment Administration (2013)
- 7) NH State Statute One Day Update (2016)
- 8) Understanding Real Property Appraisal (2017)
- 9) Intro to the Sales Comparison Approach (2018)
- 10) Workshop 171-Standards of Professional Practice and Ethics (2018)
- 11) Workshop 155-Depreciation Analysis (2018)
- 12) Forum 960-Marshall & Swift Residential Square Foot Method (2019)
- 13) Forum 962-Marshall & Swift Commercial Square Foot Method (2019)

JMB Real Estate Academy, Lowell, MA

- 1) Basics of Real Estate Appraisal (2001)
- 2) Appraising Income Properties (2003)
- 3) USPAP (2003)
- 4) USPAP 7 Hour Update (2010, 2016)

Massachusetts Association of Assessing Officers

- 1) Mass Appraisal of Real Property (2005)
- 2) Personal Property Auditing (2010)

Vision Appraisal Technology, Northborough, MA

- 1) 80 Hour In-house Training Program (2003)

State Of New Hampshire Department Of Revenue Administration: Certified Real Estate Assessor Supervisor. Expires December 31, 2020.

Certified Maine Assessor (CMA) No. 764

Connecticut Office of Policy and Management: Certified Assessment Supervisor, Certificate No: 823 Expires April 30, 2023.

State of Vermont Department of Taxes, Property Valuation and Review Division: Approved Project Supervisor

KEVIN T. LEEN

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

04/2018- **Appraiser/Project Manager**

Present Responsible for budgeting, planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, all reporting requirements as they relate to project certification and jurisdictional ad valorem defense of value.

VISION GOVERNMENT SOLUTIONS, NORTHBOROUGH, MA

08/2004- **Senior Appraiser/Project Manager**

04/2018 Responsible for budgeting, planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, all reporting requirements as they relate to project certification and jurisdictional ad valorem defense of value.

09/2001- **Senior Appraiser**

08/2004 Review residential and commercial properties for revaluation purposes. Responsibilities include sales and non-sales review, sales analysis, set neighborhood factors for land based on sales analysis, establish land and building methodology, building cost pricing and analysis, coordinate field review operations, taxpayer hearings and assist in client consultations. Assist in reporting requirements in relation to project certification and jurisdictional ad valorem defense of value.

04/1999- **Staff Appraiser**

09/2001 Review residential properties for revaluation purposes. Responsible for overseeing sales data collection and verification, total data collection effort and completing complex data collection assignments which may be beyond the scope of normal data collection personnel, quality control of data, and hearings with taxpayers. Maintaining a high level of operating competence and efficiency and monitoring and evaluation of the data collection personnel.

PROFESSIONAL APPRAISAL EXPERIENCE

1993 – 1999 **INDEPENDENT CONTRACTOR, HAMPTON, NH**
Fee Appraiser

1985 - 1993 **ABLE APPRAISAL SERVICES, NASHUA, NH**
Staff Fee Appraiser

EDUCATION

Boston College, Chestnut Hill, MA
Bachelor of Arts

APPRAISAL EDUCATION/CERTIFICATIONS

101 Introduction to Appraising Real Property
102 Applied Residential Property Valuation
410 Standards of Professional Appraisal Practice, Part A
420 Standards of Professional Appraisal Practice, Part B
The Expert Witness
Introduction to Review Appraisal
Residential & Commercial Building Components
Valuing Apartment Buildings
Factory Built Housing
IAAO Course 300: Fundamentals of Mass Appraisal
MAAO Course 3: The Income Approach to Value
Residential Report Writing Case Studies
Issues Pertaining to Shoreland Properties-Maine
IAAO Course 400: Assessment Administration
Excel for Assessors
NHAAO/State of New Hampshire DRA State Statues Part 1 (2010)
NHAAO/State of New Hampshire DRA State Statues Part II (2010)
NHAAO/State of New Hampshire DRA State Statues Update (2018)
National USPAP Update Course (1999), (2003), (2007), (2012), (2014), (2016), (2018)

Vision Appraisal Technology, Northborough, MA: 80 Hour In-house Training Program

State Of New Hampshire Department Of Revenue Administration: Certified as Real Estate Assessor Supervisor.

Certified Maine Assessor (CMA) No. 740

Connecticut Office of Policy and Management: Certified as Residential/Land Appraiser

State of New Hampshire: Certified Residential Appraiser, NHCR385 (Inactive)

DOUGLAS ROLLINS

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

10/2014- Present **Data Collector/Review Appraiser**

Responsible for the data collection of residential and commercial properties. Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property. Specific duties include data collection, building permits, digital imaging, callback appointments and residential field review. NH DRA Certified Assessor Assistant.

WORK EXPERIENCE

ASSET MANAGEMENT SPECIALISTS, PORTSMOUTH, NH

07/2013-08/2014 **Assistant Manager**

Responsible for quickly assessing amount of work and time needed at each property. Daily tasks include taking photos of work being completed on-site, upgrading inadequate safety hazards at a property, quality control, performing routine inspections, tracking inventory, and crew supervision.

LIBERTY REALTY GROUP, LYNFIELD, MA

12/2008-12/2012 **Assistant Real Estate Agent**

Responsibilities include dealing with tenants and tenant issues, showing apartments and houses to clients, completing paperwork for background checks, creating expense reports for repairs needed, developing budgets and action plans for property renovations, and preparing scouting reports for foreclosure auctions using Microsoft Word and Excel.

STAPLES, BEVERLY, MA

07/2012-06/2013 **Mobile Phone Sales Consultant**

Responsibilities include providing excellent customer service, educating customers about different phones so they can make an informed decision for their purchase, and completing necessary paperwork to process accounts.

EDUCATION

Kingswood Regional High School, Wolfeboro, NH (1996-1999)

Diploma

APPRAISAL EDUCATION

JMB Real Estate Academy (2016)

Basic Appraisal Principles

KRT Appraisal, Haverhill, MA (2014)

80 Hour In-house Training Program

NH Certified Assessor Assistant (2017)

LINDSAY HARFORD-WALLER

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

12/2018 - Present

Data Collector - Responsible for the data collection of residential properties. Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property. Specific duties include data collection, digital imaging and callback appointments.

WORK EXPERIENCE

State of Maine, Office of the State Auditor, Augusta, ME

02/2017 – 12/2018

Office Associate II – Office duties including: filing, phones, mail processing, data entry, scanning, record keeping & copying for both the audit and Unorganized Territory sides of the office. Exposure and competence in AdvantageME, processing payables, reviewing payroll reports. Primary procurement officer with %100 accuracy in expense reporting and reconciliation.

State of Maine DAFS, Maine Revenue Services, Property Tax Division, Augusta, ME

04/2015 – 02/2017

Office Associate II – Recurring duties including but not limited to filing of State Valuation Documents, fielding phone calls on a variety of topics, mail processing, RETT data entry & copying as related to State Valuation, etc. Proactive in document management and comfortable with compiling and analyzing data in excel and driven to find productive ways to do this.

State of Maine DHHS, Division of Support Enforcement and Recovery, Augusta, ME

12/2012 – 04/2015

Office Associate II – Office duties including: filing, phones, mail processing, data entry & copying. Addressed questions or concerns from non-custodial parents about arrears debt, license revocation and other enforcement actions. Handled tax-sensitive information. Managed enforcement and medical caseloads, handled order reviews to be filed in court in conjunction with assistant attorney general.

EDUCATION

University of Maine at Orono, Orono, ME (2001-2006)

Bachelor of Arts, Creative Writing

Lancaster University, Lancaster England

English Studies

APPRAISAL COURSES/TRAINING

Maine Property Tax School

- 1) Maine Municipal Manual Review (2018)
- 2) Excel Spreadsheets: Beyond Tidy Rows and Columns (2018)
- 3) Excel for Assessors (2018)

International Association of Assessing Officers

- 1) Standards of Professional Practice and Ethics (2018)

KRT Appraisal, Haverhill, MA (2018)

80 Hour In-house Training Program

Certified Maine Assessor (CMA) No. 955

Certified NH Measurer and Lister (2019)

REQUEST FOR PROPOSALS
FOR REVALUATION SERVICES
FOR THE TOWN OF GORHAM, MAINE

The Town of Gorham, Maine is seeking proposals from qualified firms to revalue all real estate property in the Town of Gorham, effective April 1, 2021.

Companies interested in providing the revaluation services set forth in the attached specifications are invited to deliver four (4) copies of the proposal to the Town Manager of the Town of Gorham no later than 4:00 PM on February 6, 2020, at which time and place such proposals will be opened and read.

All proposals shall be sealed, addressed to the Town Manager, Town of Gorham, 75 South Street, Suite 1, Gorham, Maine 04038. All bids shall be in writing, sealed, with outside envelope or wrapper plainly marked "Town of Gorham, Proposals for Revaluation Services -- Bid, not to be opened until February 6, 2020" and mailed to or filed with the Town Manager.

All information pertaining to the COMPANY'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 this Request for Proposals in order to be considered responsive. Any proposal that does not respond to each issue in the Request for Proposals may be rejected as non-responsive.

The Town of Gorham reserves the right to amend this proposal for the revaluation services for equitable assessments at any time prior to the deadline for submission of proposals and to reject any or all proposals received if it determines it to be in the best interests of the Town.

The Town will maintain a license to utilize version 6.5 or higher of Vision, and the Vision system must be fully loaded with all assessment data before the revaluation is completed. Proposals shall address the method and costs associated with the conversion of any pertinent existing data housed in the Town's software and methods and procedures for maintaining an online database and updating values in-house in the future. Conversion from the present system is solely the COMPANY's responsibility. All data entry shall be the responsibility of the COMPANY. The COMPANY shall propose a solution to include off-site data entry and computer facilities, and to complete the project without unduly impacting the day-to-day operations of the Assessing Office. The COMPANY shall be responsible for any special software licensing cost associated with completing the revaluation, over and above those paid by the Town as part of its Vision municipal software licensing package.

The Town intends to implement use of the internet for purposes of sharing assessment and valuation data with the public, including GIS-related data. The COMPANY is requested to include their internet solution (if any) as a part of its proposal.

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

1. A letter of transmittal signed by the individual authorized to negotiate for and contractually bind the COMPANY stating that the offer is effective for at least ninety (90) calendar days from the deadline for the submission of proposals.
2. A list of municipalities for which the COMPANY has completed revaluation programs.
3. A list of revaluation contracts for which the COMPANY is currently committed.
4. A description of the COMPANY's public relations program that would be used during the revaluation.

The Town shall not be responsible for any expenses incurred by a COMPANY in preparing, submitting or presenting a proposal in response to this Request for Proposals.

It is the intention of the Town of Gorham to schedule interviews for services the week of February 10, 2020.

BID PROPOSAL DOCUMENT

This document must be included in the bid package, clearly marked "BID PROPOSAL – PROPERTY REVALUATION"

<u>Service</u>	<u>Total Price</u>
Revaluation of all real property	\$ _____
Internet Services during the revaluation public disclosure period	\$ _____
Internet Services after revaluation (if applicable)	\$ _____
Any other services available	\$ _____
Additional support (if applicable)	\$ _____

Bids shall include the following information (Indicate with a (X) in the left-hand column that they have been included in your response):

- | X | No. | Item |
|-----------------------|------------|---|
| <input type="radio"/> | 1. | Name and telephone number of person(s) to be contacted for further information and clarification. |
| <input type="radio"/> | 2. | Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number. |
| <input type="radio"/> | 3. | Indication of number of years engaged as a company, corporation, partnership or individual specializing in governmental tax revaluation services. |
| <input type="radio"/> | 4. | Name of project supervisor to be assigned to this project, along with his/her resume. |
| <input type="radio"/> | 5. | Time schedule filled out according to the Contract Specifications. |
| <input type="radio"/> | 6. | Staged fee payments filled out as listed in Contract Specifications. |
| <input type="radio"/> | 7. | Rate per parcel of properties in excess of 100% filled out, as listed in the Contract Specifications. |

CONTRACT SPECIFICATIONS

I. SCOPE OF THE REVALUATION PROJECT

- A. The revaluation PROJECT requires the complete appraisal and revaluation of all real property, except where listed as "not included" in this contract specification, and all tax-exempt real property located within the corporate limits of the Town of Gorham. Of particular importance to the Town is the COMPANY'S experience using Vision software.
- B. Within ten (10) days of the award of the PROJECT, the successful bidder shall be required to execute a professional services agreement with the Town of Gorham ("the Contract"). The contents of the Town's Request for Proposals/Contract Specifications and the proposal submitted by the successful bidder shall become a part of the Contract. The COMPANY that executes the contract with the Town shall furnish all labor, materials, supplies and equipment and shall perform all work for the project in strict accordance with the contract specifications.
- C. The scope of the PROJECT shall be subject to the approval of the Town of Gorham. The Town Assessor shall have final approval of personnel, forms, records and materials utilized in this PROJECT. The PROJECT shall conform to the Standards and Qualifications defined in Rules of Maine Revenue Services.
- D. The values to be determined shall be full market value as defined in the Maine Revised Statutes Annotated and Maine Supreme Court decisions. Basis of valuation shall be the recognized methods of appraising real property, as defined by the Appraisal Institute and the International Association of Assessing Officers (IAAO).
- E. The PROJECT shall include the valuation of the following categories of property within the Town:
1. All taxable real property, including land, buildings and improvements.
 2. All tax-exempt property. All decisions regarding the taxable status of any property shall be made by the Town of Gorham.
- F. The effective date of this revaluation PROJECT shall be for the Assessment Date of April 1, 2021. Valuations and appraisal of all taxable and exempt real property shall reflect full market value for the Town's tax commitment that year.

G. Approximate number of accounts as of April 1, 2020 is as follows:

	Number of Properties
Residential Improved	5995
Residential Vacant	531
Residential Condominium Units	406
Mixed Use	2
Commercial Improved	152
Commercial Vacant	9
Industrial Improved	139
Industrial Vacant	20
Special Open Space	137
Regular Open Space	22
Total Accounts Taxable	±7,173
Exempts	160
Total Accounts Exempt	±160
Total Accounts	±7,600

H. Pertinent Town Data

1. Last revaluation was effective as of _____.
2. Estimated Population as of the most recent census is _____.
3. The total area of the corporate is ±____ square miles.
4. Estimated number of building permits per year: ±____ total (±__ new dwellings)
5. Estimated number of qualified sales per year ±_____.

II. GENERAL CONDITIONS

A. PROJECT AWARD

The Town of Gorham reserves the right to reject any part of, or all of each bid proposal; to waive informalities and technicalities; and to accept that proposal which the Town, in its sole, exclusive judgment, deems to be in the best interest of the Town. Proposal price shall be a consideration, but lowest dollar cost proposal shall not be the sole criteria to be considered. The Town will evaluate each proposal based on the documentation requested herein, and proposals will be scored using criteria that include, but are not necessarily limited to, the following: (1) experience providing residential, commercial and industrial revaluation services in Maine; (2) ability to perform the scope of work by August 1, 2021; (3) experience working with Appraisal Vision CAMA software; (4) price; (5) the written proposal; (6) quality and experience of the COMPANY'S personnel; (7) the nature and size of the COMPANY; (8) client references; (9) an oral presentation (if requested); and (10) the quality of similar projects performed by the COMPANY in the past.

B. COMPANY

1. Certification

Each company, corporation, partnership, or individual must hold from the time of submission of the proposal through the completion of all work hereinafter required, written certification of approval by the State of Maine, Maine Revenue Services to provide revaluation services in the State of Maine.

2. Proposal

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

C. PERSONNEL

The COMPANY shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of federal and State law. The COMPANY shall submit to the Town written qualifications of all personnel assigned to this project in the form of a resume. All personnel assigned to this project shall be subject to the approval of the Assessor and shall be caused to be removed from this project by the COMPANY upon written recommendation of the Assessor.

1. Office Space, Hours, Staffing

The Town will furnish the COMPANY sufficient office space and necessary office furniture and allow access to telephones and copier equipment to carry out the terms of this contract. The COMPANY shall be responsible for all associated phone costs and copier expenses. The COMPANY shall inform the Assessor of the availability of the contract representative.

2. Minimum Qualifications

The COMPANY shall employ personnel in such positions as necessary to execute the provisions of this PROJECT. Said personnel shall, at a minimum, possess the minimum qualifications as established by the Rules of the Maine Revenue Services.

- a. The project supervisor shall have at least five (5) years of appraisal experience, review appraisers shall have at least three (3) years of appraisal experience and measurers and listers shall have at least one (1) year of appraisal experience. The COMPANY must provide evidence that they employ at least one certified Maine assessor as described in 36 M.R.S.A. §§ 310 and 311.

- b. One measurer and lister trainee may be used on the project for each two experienced measurers and listers used but must be under the direct supervision of a measurer and lister with at least two years of appraisal experience.
- c. One review appraiser trainee may be used on the project under the direct supervision of the project supervisor. It is expressly understood that a minimum number of review appraisers shall be used on the project and that, whenever possible, the job supervisor shall be the sole review appraiser.

3. Identification

All field personnel shall carry suitable I.D. cards, which shall include an up-to-date photograph, supplied by the COMPANY. All automobiles used by the field personnel shall be recorded with the Town of Gorham, giving license number, make, model, year and color of the vehicle. The COMPANY will cause pictures of its listers to be published in the local media in order to identify them as legitimate members of the revaluation team. In the event of rotation of personnel, new pictures will be published.

4. Conflict of Interest

No resident or employee of the Town shall be employed by the COMPANY on this project without the express permission of the Assessor and the Town Manager.

D. PROTECTION OF THE TOWN

1. Bonding

The COMPANY shall, to secure the faithful performance by the COMPANY of the terms of the CONTRACT, furnish to the Town of Gorham a Performance Surety Bond within fifteen (15) days of the execution of the CONTRACT, in the amount of the CONTRACT, which bond shall be issued by an admitted bonding company licensed to do such business in the State of Maine within an A.M. Best Company rating of "A+" or better. Said bond shall be delivered to Town of Gorham prior to the commencement of actual work and shall be in a form satisfactory to and approved by the Town. This bond shall secure performance of all the COMPANY'S obligations under the contract including the COMPANY'S obligation to address abatement applications for the April 1, 2021 assessments under Section VIII(B) of the contract specifications.

2. Indemnification and Insurance

- a. The COMPANY agrees to defend, indemnify and hold harmless the Town, its officers, agents and employees against all claims, demands, payments, suits, actions, recovery and judgments of every kind and description arising out of the performance of the Contract by reason of any negligent or tortious action or omission of the COMPANY, its agents or employees.
- b. The COMPANY shall not be responsible for consequential damages arising from the late performance or non-performance of the Contract caused by circumstances that are exempt from liquidated damages under Section II(D)(3) of these specifications.

- c. The COMPANY shall maintain public liability insurance, automobile liability insurance and workers' compensation insurance (in an amount required by statute).
- d. The public liability insurance shall be in the form of commercial general liability with the inclusion of contractual liability coverage and shall provide limits of \$1,000,000 per occurrence, \$2,000,000 aggregate.
- e. The automobile liability insurance shall be in the form of comprehensive automobile liability and shall provide limits of \$1,000,000 per occurrence, \$2,000,000 aggregate.
- f. The COMPANY shall carry valuable papers insurance on any and all records applicable to the project against the loss or destruction of such records in an amount of not less than the contract price.
- g. The COMPANY shall not deny liability because of any legal defense to which the municipality is entitled by reason of being a municipality.
- h. The COMPANY shall provide to the Town:
 - (1) Certificates of insurance, written by an insurer licensed in the State of Maine, confirming that the required insurance coverage is provided to the Town and showing the Town as an additional insured on the liability policy; and
 - (2) A ten (10) day written notice of the cancellation or material change in the required insurance coverage.

3. Liquidated Damages

Failure of the COMPANY to complete all work prior to the date specified herein, August 1, 2021, shall be cause for a payment from the Company on the request of the Town in the amount of ONE HUNDRED DOLLARS (\$100.00) per working day beyond the specified date of completion. Any liquidated damages may be deducted from the contract sum owed the company. For the purpose of this liquidated damages provision only, completion of all work is defined to include all of the following:

- Completed data collection cards with all measurements and listings.
- Completed review documents.
- Completed informal meetings and post-informal meeting corrections.
- Completed sales analysis.
- Completed final valuations and total work product delivered.
- CAMA system in place, data loaded and fully operational.

These liquidated damages, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, or acts of God or an order of court of competent jurisdiction are exempted.

E. COMPLETION DATE AND TIME SCHEDULE

1. Changes and Assignment of Contract

a. Revisions, Modifications and Assignment

The COMPANY shall not change, modify, assign, transfer, delegate or sublet the CONTRACT, or any interest or part therein, without first receiving written approval from the Town, the Maine Revenue Services and the bonding company. It shall be mutually agreed and understood that said consent by the Town shall in no way release the COMPANY from any responsibility or liability as covered in these specifications and the Contract.

2. Time Schedule

- a. Revaluation work shall start in the Town no later than thirty (30) days after signing of the Contract but no site visits will take place until after April 2, 2020.
- b. All corrected and finalized appraisal cards shall be completed and turned over to the Town no later than August 1, 2021, at which time CAMA data shall be fully loaded, tested and operational on the Town's computer system.
- c. The COMPANY will provide a comprehensive schedule of the project that meets the August 1, 2021 delivery date.
- d. The completed appraisals, upon approval of the Assessor will be the basis for the assessment date of April 1, 2021. All data contained on the appraisal cards and the software package shall reflect the assessment date of April 1, 2021.

F. PAYMENT SCHEDULE

Payments shall be made in the following manner: Thirty (30) days after the execution of the CONTRACT, and thereafter within ten (10) days of the end of each succeeding month, the COMPANY shall forward to the Assessor an invoice of work completed during the thirty (30) day period of the preceding month. Such invoice will itemize and accurately indicate the extent and nature of the work performed by volume, street, and category or in any other manner required by the Assessor. All monthly progress reports and work completed will be subject to the review and approval of the Assessor. Payment shall be within 30 (thirty) days of invoice date.

Upon the Assessor's determination that the invoice accurately portrays the work performed during the previous month, a percentage payment, representing ninety (90%) of the proportion of the total work completed for that month shall be paid to the COMPANY.

The COMPANY shall submit with its proposal the completed schedule and percentage of completed work showing the fee breakdown activity as listed as Section II(G) of these specifications, SCHEDULE AND PERCENTAGE OF COMPLETED WORK.

Ten percent (10%) of the total CONTRACT amount shall be withheld until such time as the Assessor determines that the COMPANY has performed fully and satisfactorily all of its obligations and requirements under the contract.

G. SCHEDULE AND PERCENTAGE OF COMPLETED WORK

**Progress Report & Percentage of Completed Work:
(Recommended project percentages)**

CODE	TASK	% AMOUNT
100	Bonding, office set-up, project set-up, training, public relations	_____
200	Data collection, quality control, data entry	_____
300	Residential valuation and data mailers	_____
400	Commercial/Industrial valuation and data mailers	_____
500	Residential field review, data entry	_____
600	Commercial/Industrial field review, income production, reconcile cost and income	_____
700	Digital imaging, digital camera, documentation, hardware	_____
800	Impact notices, residential and commercial/industrial informal meetings, field work, data entry	_____
900	Project finalization, change notices, special land pricing, client meetings, goodwill	_____
1000	Support of values, goodwill	_____
1100	Fully operational system Vision interface with all workstations and peripherals	_____
		TOTAL: 100%

III. RESPONSIBILITIES OF THE REVALUATION COMPANY

A. GOOD FAITH

The COMPANY 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 VIII(B) of the specifications.

B. PUBLIC RELATIONS

The parties to this revaluation PROJECT recognize that a good public relations program is required in order that the property owners and general public of the Town may be informed as to the purpose, benefits and procedures of the revaluation. The COMPANY shall, with the Assessor's approval, conduct a program of public information. The COMPANY shall participate in meetings 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 COMPANY shall supply visual aid and other media at its disposal to this end. The COMPANY shall be responsible for providing weekly public information notices advising citizens of the project's progress. All public information releases shall be approved by the Assessor prior to release. The COMPANY shall submit a detailed public relations plan to the Town within thirty (30) days of execution of the Contract.

C. CONDUCT OF COMPANY EMPLOYEES

As a condition of the CONTRACT, the COMPANY's employees shall at all times treat the residents, employees and taxpayers of the Town of Gorham with respect and courtesy; the COMPANY shall take appropriate and meaningful disciplinary measures against those COMPANY employees who violate the terms of this provision.

D. RECORDS

1. General Provisions

The COMPANY shall provide all appraisal cards, computer supplies, office supplies, equipment, forms, and literature at its sole cost and expense. The Town shall make available all current computerized Assessor records.

2. Records are Town Property

The original or a copy of all records and computations, including machine readable databases, made by the COMPANY in connection with any appraisal of property in the Town shall at all times be the property of the Town and upon completion of the PROJECT or termination of the 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, the following: 1) tax maps; 2) land value maps; 3) materials and wages, cost investigations and schedules; 4) data collection cards, final property record cards with property valuations and separate sketch cards (if any); 5) cost sheets; 6) comparable sales data and analysis; 7) capitalization rate data; 8) depreciation tables; 9) computations of land and building values; 10) written communications with individuals or groups explaining methods used in appraisals; 11) operating statements of income properties; and 12) photographs.

3. Assessor's Records

The COMPANY shall use a system approved by the Assessor for the accurate safe keeping and accounting of all records and maps, which may be taken from the files of the Assessor in connection with appraisal work. All such records and maps shall be returned immediately. None of the Assessor's records shall be taken outside of the corporate limits of the Town without prior permission of the Assessor except in the case of digital copies.

4. Appraisal Cards

The COMPANY shall complete field record cards, commonly referred to as "Data Collection Cards" filed by the map/lot number. These cards shall contain all manner of information affecting value, including, but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, and with a breakdown of front feet, square feet and acreage, public utilities available, public improvements and zoning designations in effect as of the assessment date. All physical improvements shall be measured giving a listing of all interior and exterior construction details. Quality of construction, age and condition will be shown. The COMPANY shall also provide a set of cards commonly referred to as "final property record cards". These cards shall contain all information collected at

the property as well as all information necessary to the valuation process. This information shall be computer generated and will include the sketch of the dwelling along with all-physical data, replacement cost, depreciations, grade, age, condition and fair market values of the land and buildings. These records shall be filed by map/lot.

5. Sketches

Sketches of all major buildings shall be drawn to scale with dimensions given on the data collection card or on a separate card. Final property record cards shall have all sketches printed to scale. The CAMA system shall provide an interactive link between the sketch program and cost tables to arrive at structure values.

E. ASSESSMENT NOTICES

Before the close of the revaluation, a notice shall be sent, at the COMPANY'S expense, by first class mail, to each owner of record, setting forth the new valuation that has been placed upon the property identified in the notice. The COMPANY will provide the needed information for the notice. Also enclosed will be a letter specifying the dates, times and location of the informal meetings. Such notices and letter shall be subject to approval by the Assessor and shall include the appeal procedures available to taxpayers.

F. INFORMAL MEETINGS/BOARD OF ASSESSMENT REVIEW

At a time mutually agreeable to the Assessor and the COMPANY but not later than August 1, 2021, the COMPANY shall hold informal meetings so that the owners of property, or their legal representatives, may appear at specified times to discuss with qualified members of the COMPANY'S staff, the assessed valuations of their property. The COMPANY'S personnel shall explain the manner and methods of arriving at value. The COMPANY, with the approval of the Assessor, shall schedule a sufficient number of informal meetings in order to expeditiously and fairly handle all taxpayer inquiries as pertains to the assessment of their property. The Assessor or Assessor's designated representative may attend any or all informal meetings. Any information offered by the taxpayers shall be given consideration and adjustments shall be made where warranted. After the informal meetings, the COMPANY shall be responsible for sending a updated notice to each taxpayer or his or her representative who appeared at an informal meeting seeking a review of the assessment; provided, however, that it is specifically understood that in fixing the assessed values of properties within the Town, the Assessor shall exercise full and final judgment and that all appraisal and revaluation services performed by the COMPANY shall always be in an advisory capacity to the Assessor for the express purpose of furnishing information to the Assessor to enable the Assessor to arrive at a fair and just value of all property within the Town. Such notice shall include the adjusted assessment or a statement that no change is warranted. In the event the owners of the property are not satisfied with the results of the informal meeting and take an appeal to the Board of Assessment Review, the COMPANY will provide qualified personnel to attend the Board of Assessment Review hearing(s) in defense of the assessment upon request by the Town Assessor.

G. INFORMATION

Throughout the appraisal process, the COMPANY shall satisfy all requests made by the Assessor for information as to the COMPANY'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 throughout the duration of the PROJECT.

H. BUILDING COST SCHEDULES

1. General

The COMPANY shall prepare for usage in the program as hereinafter specified, building cost schedules. Said schedules will reflect the square foot cost method based upon the square foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial and industrial 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 the construction. Before final acceptance, they shall be documented and proven by testing against known sales. All finalized schedules shall be approved by the Assessor before adoption and usage of the COMPANY.

All documentation utilized in the investigation of local costs, labor costs, labor rates, material costs, depreciation rates, etc. utilized to compile the cost schedules shall become the property of the Town.

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, garages and schedules for other building improvements usually found on residential property (e.g., swimming pools, barns, sheds, tennis courts).

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 the base specifications.

c. Industrial and Special Structures

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

d. Outbuildings

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

3. Physical Depreciation Schedules

Physical 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 and farm buildings. Functional and economic obsolescence, if any, shall be analyzed and calculated on an individual property basis using generally acceptable methods and techniques.

4. Schedules for Town

The COMPANY shall supply and leave for the Town not less than three (3) copies of all the above required building cost schedules and depreciation schedules for Town usage, one copy of which shall be turned over to the Assessor upon approval of the schedules.

IV. APPRAISAL SPECIFICATIONS

A. APPRAISAL OF LAND

The COMPANY shall appraise all residential, commercial, industrial, agricultural, special use and exempt and non-taxable land within the Town. The Town shall provide two (2) sets of maps, including tax, zoning and wetlands maps and information regarding variances and special exceptions (conditional uses) granted by the Town.

1. Land Inspection

The COMPANY shall be responsible for being familiar with each plot or lot, noting topographical irregularities, wetlands, soil conditions, shape or any other factors that may affect the use or value of the property.

2. Land Value Study

Land value shall be determined on the basis of highest and best use.

- a. Vacant land sales data shall be analyzed on all sales, at a minimum, for arms-length transactions occurring during the two (2) years prior to April 1, 2021.
- b. Improved property sales data shall be analyzed, at a minimum, for arms-length transactions occurring during the two (2) year period prior to April 1, 2021, in order to estimate land values by the residual method.
- c. Zoning designation shall be noted on each property, and the results of (a) and (b) above shall be organized and presented in a format stratified by zone designation.

- d. The analysis and application of sales data shall be governed by procedures and techniques approved by the Assessor.
- e. The COMPANY shall consult owners, realtors, banks, appraisers and other sources for information relative to land values in the Town.
- f. The COMPANY shall consider factors affecting land value, such as location, zoning, available utilities, size, shape, topography, view, improvements, special exceptions (conditional uses) or zoning variances, non-conforming uses, flood plains, special purpose uses, and form of ownership.
- g. All factors affecting value and valuation computations, including but not limited to those listed above, shall be entered on the master file and the appraisal cards.

3. Land Value Unit

The Assessor, in consultation with the COMPANY from its recommendation, shall determine what type of land unit value shall be used for the various types of property and various locations. The front foot, square foot, acreage, fractional acreage and per lot units shall be considered, among other possibilities.

4. Land Value Map

The COMPANY 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 revaluation PROJECT.

5. Neighborhood Delineation

After consideration of the environmental, economic and social characteristics of the Town, the COMPANY shall, with the cooperation and approval of the Assessor, delineate "neighborhood" units within the Town. Properties within each neighborhood unit will exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. Neighborhood numbers shall be recorded and maintained on street cards, Town maps and the computer database.

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES

All residential buildings shall be inspected, classified, priced and reviewed to include the 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. The COMPANY will be responsible for the conversion of all data elements stored on the Town's current appraisal master file. This conversion can be performed either electronically or manually at the COMPANY'S discretion.

1. Interior Inspection

- a. The COMPANY shall guarantee to make a careful inspection of the complete interior of all properties except for the following conditions:
 - Unoccupied buildings
 - The owner has refused entry to the property
 - Structures that are deemed unsafe by the Assessor and COMPANY
 - Inhabitants that appear hostile, dangerous or threatening
 - No response to the notification letter
 - Any other reason which the Assessor and COMPANY agree makes the property inaccessible
- b. Properties with owners who have not answered COMPANY letters requesting an appointment for inspection will also be excluded from the total number of properties in computing the 100% figure.
- c. The lister shall have each interior inspection verified, including the date of inspection, by having an adult owner or resident 18 years or older of each building or dwelling unit sign the field card.
- d. When entrance to a building for inspection is refused, the lister shall make note of the fact and shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and make adequate notations of the lack of cooperation and the manner of arriving at value, conspicuously on the card.
- e. The listing card shall indicate the initials of the lister and the date of the listing.
- f. Where necessary, if no contact has been made with the property owner, the COMPANY shall make one (1) call back which will either be on a weekday after 5:00 p.m. or on a Saturday. The time and date at which the call back was made shall be duly noted on the field record card by the lister making such a call back.
- g. If after two (2) attempts, contact was not established with the property owner, a notification letter approved by the Assessor, shall be mailed, notifying the property owner that the representative of the COMPANY was not able to make contact. The notice will request that the property owner contact the COMPANY by mail for alternative arrangements for the inspection of the property. Refusals and lack of response to the COMPANY'S letter shall not be counted in the category of non-inspected properties.
- h. In the event that no interior inspection is possible, the lister should honor the privacy of the homeowner and not attempt to ascertain the condition and quality of a structure's interior by looking through doors or windows. In these cases, observation should be limited to what casually can be observed from the street with the naked eye unaided by any mechanical, electrical or optical devices.

2. Exterior Inspection

- a. The perimeter of all residential buildings and improvements shall be carefully measured. The COMPANY is responsible for the accuracy of all exterior information.
- b. All buildings shall be measured to the nearest one-foot. Story heights of the various sections and subsections shall be noted on the property record card.
- c. An outline sketch, prepared to scale, shall be made for each parcel.
- d. Physical data of the parcel shall be verified from existing records and recorded at the site.

3. Review

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

4. Valuations

- a. Valuations of all land and buildings must reflect the fair market value as of April 1, 2021, and shall be done from and in accordance with the Assessor' approved manuals and schedules.
- b. The final valuation shall be the market value of the structures plus the market value of the land. In arriving at the market value of the structures replacement cost less depreciation from all causes may be considered along with other factors affecting the value of the property, all of which shall be noted on the appraisal card.

5. Sales Analysis

Prior to the data verification phase of this project, a sales analysis program of residential properties shall be performed as a means of determining the schedule levels to be utilized in the project and for substantiating the neighborhood boundaries and groupings established. This analysis shall be done on the aggregate of all residential properties and on each of the neighborhoods previously delineated. The sales analysis shall include, at a minimum, sales ratios and coefficients of variation or dispersion. Additional requests for sales ratio studies by the Assessor shall be performed. The sales analysis shall be in the same manner as that used by Maine Revenue Services in the State Valuation.

C. APPRAISAL OF COMMERCIAL, INDUSTRIAL AND SPECIAL PURPOSE PROPERTIES

1. General

All commercial, industrial and special purpose buildings shall be inspected, classified, priced and reviewed in the same manner as residential properties as set forth above, and the dimensions of all buildings shall be to the nearest foot and the height of the building shall also be recorded on

the property record card and the master file. All buildings shall be identified and described as component parts of construction, size, area, age, usage and present occupants on the property forms as previously provided in these specifications.

2. Income Approach

- a. Income and expense data shall be gathered by the COMPANY on forms approved by the Assessor, which shall become the property of the Town at the completion of the PROJECT. This information shall not be a public record.
- b. The COMPANY shall develop, with the involvement of the Assessor, capitalization rates and gross rent multipliers by interviews with bankers, investors, realtors and appraisers. This information shall be documented in writing and provided to the Assessor.
- c. The COMPANY shall determine market or economic rents and expenses and applicable capitalization rates and/or gross rent multipliers for various classes of commercial property. The COMPANY shall document, in writing, the sources of this information, describe its analysis in determining these values and provide this documentation to the Assessor.
- d. The COMPANY shall perform the income approach by the accepted methods of capitalization. Gross rent multipliers shall be used as an additional valuation check where applicable.
- e. The COMPANY shall mail income and expense questionnaires all responses to the questionnaires shall be returned to the COMPANY, but shall be the property of the Town at the completion of the PROJECT.
- f. All information gathered, received or used by the COMPANY to develop values using the income approach must be given to the Assessor at the end of the PROJECT or upon request.

3. Plat Plan

A plat plan shall be made of all commercial and industrial properties where more than one building is present showing the location of and identification of the buildings and yard improvements.

4. Yard Improvements

All yard improvements shall be listed and valued separately.

5. 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, to the satisfaction of the Assessor, in the appraisal of the particular type and kind of

commercial, industrial or special purpose building; the final value of which he or she is responsible.

D. APPRAISAL OF CONDOMINIUMS

1. Residential and commercial condominiums shall be valued by the direct market comparison approach. For each complex there shall be a master card, showing the project diagram and assessed values for each unit type and each unit as well as a final property record card for each unit.
2. All residential and commercial condominiums shall be valued using the same procedures as described above in these specifications.

E. CONTROL AND QUALITY CHECKS

1. Field Checks

The Assessor shall conduct spot checks in the field on properties chosen at random by the Assessor, with or without the assistance or knowledge of the COMPANY supervisor.

2. Building Permits

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

3. Incomplete Construction

The COMPANY shall designate on the master file each property which has incomplete improvements as of April 1, 2021. The final card shall list all improvements, show the percentage of completion of all improvements and reflect the percentage of completion in the valuation as of that date.

4. Accuracy.

The COMPANY's revaluation work shall be sufficiently accurate to achieve a minimum assessment ratio of 95% and a maximum quality rating of 10 for all major categories of taxable properties when evaluated by the State Tax Assessor pursuant to 36 MRSA sec. 327 upon filing of the Town's annual return under 36 MRSA sec 383 for tax year 2021-2022. In the event the COMPANY's work fails to achieve the required assessment ratio or quality rating with respect to one or major categories of taxable properties, the COMPANY shall perform all necessary corrective work to achieve the required standards at no additional charge. Major categories of taxable property shall consist of commercial, industrial, residential and waterfront properties.

V. COMPUTER ASSISTED MASS APPRAISAL (CAMA)

A. GENERAL REQUIREMENTS

1. Of particular importance to the Town of Gorham is the COMPANY's experience in performing computerized revaluations and statistical studies, using Vision 6.5 or a newer version in use by the Town of Gorham.
2. The COMPANY will provide:
 - a. Statistical analysis by market stratification; ratio studies and coefficients of dispersion by total sampling, geo-districts and by property type or use and by age of improvements.
 - b. Administration studies such as total land valuations and total valuations by Town-wide, districts and property types or uses, including taxable and exempt properties.
3. The computer applications must be employed by the COMPANY from the very onset of the revaluation program, in order that the system output will support the final product. Development of the final database will be a joint venture of the Town and the COMPANY.

B. COST APPROACH MODULE SPECIFICATIONS

1. This CAMA module includes data management and cost valuation components for commercial, industrial and residential properties. It produces a valuation document showing the cost calculations on each property, the appraisers' adjustments and final value determination. The module accesses a maintainable table of replacement cost formulas and depreciation schedules which are keyed to a structure code (indicating what the improvement was built as or designed to be used for). It provides for correlation of the cost approach with the market approach through the use of economic condition factors as well as the standard depreciation for age, condition and functional obsolescence.
2. The system computes value estimates based on standard appraisal methodology (acceptable by the IAAO and the Appraisal Institute) with clear documentation for non-automated value computations and defense of values. All cost schedules are to be determined by the COMPANY and approved by the Assessor. The basic residential classification system shall identify property within frame type, quality class and floor area as a minimum. Also, values must be responsive to effective age. The component costs shall be easily understood in terms of cost new, depreciation and land rate schedules.
3. The system provides for online updating of the data management file with the cost estimates. This includes the capability in the years following the revaluation of pricing any additions or new outbuildings through the cost approach and adding the depreciated value to the market-generated solution. This function will offer increased versatility after the revaluation.
4. The land pricing function shall utilize Computer-Assisted Land Pricing tables to provide location and land-use indexing for mass updating of land values. Land pricing should also have the ability to utilize preferential unit land values in addition to market-based unit land values.

5. Computed cost values for key fields shall be stored on a value history file of record. These would include Replacement Cost New (RCN) of each structure, Replacement Cost New Less Depreciation (RCNLD) of each structure, land value, physical depreciation by structure and functional/ economic depreciation by structure. The cost estimates shall be fully integrated with the market approach subsystem to develop reports to study depreciation schedules, land rate schedules, neighborhood factors, date of sale adjustments and certain cost adjustment factors. Cost schedule additions shall not require program modifications. New codes can be added by updating cost schedules and data management libraries.

6. The system is capable of calculating both the ad valorem and market value, specifically dealing with current use.

C. MARKET APPROACH MODULE SPECIFICATIONS

The market approach CAMA module provides for data screening, segmented analysis, market model generation, model evaluation, value predictions, comparable selection, adjustment of comparables and filed review reports.

The market module shall produce market value estimates using comparable sales. It shall include the ability to extract sold properties from the master file and build a sales history file for sales analysis purposes. For each improved residential property to be valued, the computer shall select from the sales history file (3-5) comparable properties, which have sold recently.

The comparable properties will be chosen from the same neighborhood unit or area similar to that of the subject. The system includes the ability to analyze sales ratio statistics by neighborhood unit as well as class. This shall provide the necessary information to make comparisons between classes and locations and identify categories with significant differences in value level or variance. These categories can then be checked to determine if adjustments are required.

D. SPECIFICATIONS FOR INCOME APPROACH MODULE

The income approach module contained in the system shall perform valuation by income capitalization. All real property containing more than four income-producing units shall be valued by the income approach. Information pertaining to income, rents, and expenses and financing shall be obtained on forms provided by the COMPANY and approved by the Assessor. This information shall be entered by the COMPANY into the CAMA system. Methods of capitalization shall include mortgage equity or discounted cash flow but not building residual techniques. The Assessor shall be involved in the development of capitalization rates to be utilized. All confidential income and expense data described in this section shall become the property of the Town. All conclusions drawn by the income approach shall be supported by sales data.

E. MISCELLANEOUS PROVISIONS

1. Warranties

- a. The COMPANY represents and warrants to the Town that it will use the software and documentation in accordance with the terms of the CONTRACT.

- b. The COMPANY shall warrant that it will comply with all issues relating to software ownership or as to any patent, copyright or trade secret infringement.
- c. The COMPANY represents and warrants that any services provided by the COMPANY hereunder shall be rendered in a professional manner by qualified personnel trained and skilled in the performance of the specific service involved and that the COMPANY shall employ qualified personnel in such positions as are necessary to execute or to fulfill all the terms and conditions of the Contract and that such personnel shall possess the minimum qualifications as established in Rules of Maine Revenue Services.
- d. The COMPANY represents and warrants that all goods, materials, hardware, software and services provided hereunder shall be in conformance and compliance with all applicable Federal, State and Local laws, administrative and regulatory requirements and any other authorities having jurisdiction over the subject matter of the Contract.

F. TRAINING, DOCUMENTATION AND MAINTENANCE

- 1. The COMPANY agrees to provide to the Town, at no additional charge, copies of all documentation for the valuation system by no later than the completion date of the project. The documentation shall include comprehensive user manuals, which clearly explain data collection, data entry and all appraisal operations, systems and functions and other support material.
- 2. The COMPANY agrees to provide to the Town, at no additional charge, comprehensive training in use, operation and technical aspects of the system and the COMPANY'S appraisal process on Town premises. Such training shall be sufficient so that the Town personnel shall be able to operate and understand the use and operation of the system and the appraisal process.

VI. RESPONSIBILITIES OF THE TOWN

A. NATURE OF SERVICE

It is understood and agreed that the services rendered by the COMPANY are in the nature of assistance to the Assessor and all decisions as to final valuations shall rest with the Assessor.

B. COOPERATION

The Assessor, the Town and its employees will cooperate with and render all reasonable assistance to the COMPANY and its employees throughout the revaluation process.

C. ITEMS FURNISHED BY THE TOWN

The Town shall furnish the following:

- 1. Maps

The Town shall furnish two (2) sets of updated tax maps showing streets, property lines, and parcel identification numbers. Maps shall be turned over within thirty (30) days of execution of the contract.

2. Land Dimensions

The Town shall make available lot sizes and total acreages to the COMPANY whenever available, and reasonable estimates where the information is not available. The Town shall also provide assistance during informal reviews to resolve discrepancies due to land sizes, boundaries, etc.

3. Zoning

The Town will provide two (2) sets of current Town zoning regulations and zoning maps, as well as information regarding variances and special exceptions (conditional uses) granted by the Town.

4. Property Transfers

The Town shall notify the COMPANY, on a regular basis, of property splits and transfers occurring after the initial file build by the COMPANY. The COMPANY shall update appraisal cards and the master file as necessary.

5. Building Permits

The Town shall make available copies of all building permits issued during the course of the revaluation project up to April 1, 2021.

6. Signing of Communications

The Assessor and the COMPANY'S project manager shall sign communications to be mailed at the COMPANY'S expense, for the purpose of contacting a property owner for inspection of the property and to obtain income and expense information for the income approach to value commercial properties, personal property inventories and other necessary and appropriate procedures.

7. Mailing Address

The Town shall make available, through the Assessor's office, the current mailing address of all property owners.

VII. TRANSMITTAL OF RECORDS TO THE ASSESSOR

The COMPANY shall make periodic delivery of appraisals to the Assessor for review in accordance with a schedule agreeable to the Assessor and the COMPANY. All completed and corrected records shall be turned over to the Town by August 1, 2021. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were inspected in order that the final appraisal of property shall be appraised as of April 1, 2021. All appraisals must be accepted by the Assessor before the PROJECT can be considered complete. All information, appraisals and records shall not be made public until after the informal meetings, 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 the CONTRACT shall conform to the procedures and technical requirements of the Assessor.

VIII. GENERAL CONDITIONS

A. CANCELLATION AND MATERIAL BREACH

If the COMPANY 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 COMPANY shall make any 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 hereunder to terminate the CONTRACT and withhold any payments due.

Should the COMPANY fail to fulfill, in a manner deemed timely and satisfactorily to the Town, its obligation under the CONTRACT, or if the COMPANY should violate any of the material covenants, conditions or stipulations of the CONTRACT, which failure or violation shall continue and is not cured for thirty (30) days after written notice and description of said failure or violation is provided by the Town and is received by the COMPANY; then the Town shall have the right to terminate the CONTRACT by giving written notice to the COMPANY of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination; and the COMPANY shall remain liable for the breach of the CONTRACT by the COMPANY.

If this termination clause is invoked, the COMPANY'S agents and employees shall, at the Assessor's direction, vacate the office space provided by the Town in an orderly fashion, leaving behind all records, properly filed and indexed, as well as all other property of the Town, in good condition. 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 cost in obtaining another contractor and supervising the transition. To the extent that any funds held by the Town under the CONTRACT do not cover the Town's costs to obtain another contractor and to supervise the transition, the COMPANY shall be liable to the Town to reimburse the Town for such costs. Termination of the CONTRACT and retention of funds by the Town shall not preclude the Town from bringing an action against the COMPANY before an arbitrator requesting damages or exercising any other legal, equitable or contractual rights the Town may possess in the event of the COMPANY'S failure to perform, including but not limited to, recovery costs and attorney's fees.

B. DEFENSE OF VALUES

For all requests for abatements or appeals of April 1, 2021 assessments, the COMPANY will work in accordance with the following procedures:

1. Upon receipt of all abatement requests of April 1, 2021 assessments, qualified personnel will review the applications and make recommendations to the Assessor on whether the valuation should be modified or remain as is.
2. If necessary, the COMPANY will participate in negotiating sessions with aggrieved applicants during an agreed upon time period in an attempt to settle the dispute.
3. If the assessing officials reduce the value of a property as part of the proceedings, the COMPANY shall still be responsible to support the reduced value.

4. If the assessing officials increase any value estimated by the COMPANY, the COMPANY shall not be responsible for providing a representative to support the adjusted value.

5. If the property owner is dissatisfied with the outcome of the informal meetings and related negotiations, qualified COMPANY personnel will provide testimony in support of the value at the local Board of Assessment Review.

6. Qualified COMPANY personnel will provide attendance and/or testimony at the State Board of Property Tax Review and prepare supplemental reports as necessary. The Town shall provide a minimum of twenty (20) days' notice to the COMPANY to provide such personnel for any such required attendance and/or testimony. The COMPANY will provide attendance and/or testimony, court support and preparation for five (5) days at no additional cost to the Town.

7. The COMPANY agrees to assume all costs for services rendered by it in connection with any hearings or reviews to the level of local board of assessment review or the state board of property tax review provided the filing of such hearing or review is commenced within one (1) year after the current commitment date representing the values resulting from the contract.

C. EXCUSABLE DELAYS

In no event shall either party be liable to the other for any delay or failure to perform which is due to any act of God, or actions of civil or military authorities, civil disturbance, wars, strikes, fires, natural catastrophes or other similar causes beyond the control and without the fault or negligence of the party claiming excusable delays.

D. DISPUTE RESOLUTION

Except as otherwise agreed by the parties in writing, all disputes, controversies, claims, counterclaims and other matters in question between the Town of Gorham and the COMPANY arising out of or relating to the CONTRACT shall be decided by a Maine court of competent jurisdiction. The CONTRACT is made and shall be construed under the laws of the State of Maine except any choice of law rule that may direct the application of the laws of any other nation or jurisdiction. Except as otherwise expressly agreed by the parties in writing, exclusive venue for any such civil action shall be in Maine Superior Court (Cumberland County).

E. DELIVERABLE PRODUCTS

All documents, records, data and other material, in either manual, mechanized or electronic form, procured or produced in the performance of the PROJECT will be the sole property of the Town at the conclusion of the PROJECT, as determined by the Assessor. The documents, records, data and other materials shall include, without limitation, the following:

1. Documentation of procedures used throughout the PROJECT;
2. All materials and manuals used in any phase of the PROJECT;

3. The data collection and valuation manuals which will enable the municipality to maintain and update values;
4. Detailed valuation manuals, including tables and formulas to be used in applying the cost, sales comparison and income approach schedules;
5. Source information used in the development of cost, sales comparison and income approach schedules;
6. A property field inspection card (field data source document used by data gatherers) and a final computer generated property record card for each parcel;
7. All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties;
8. All sales ratio studies used in the project;
9. Field review documents reflecting preliminary values, adjusted preliminary values and any notes relative to informal review actions; and
10. A report of all informal meetings held with the COMPANY'S representative, showing the number of informal meetings, the number of values changed and the number of values unchanged.

F. CONTRACT

The Town of Gorham and the COMPANY shall enter into a formal contract, and all or some of the papers of the proposal, shall be considered as an integral and inseparable part of said contract as agreed upon by both Parties.

Any questions, comments or requests for additional information shall be addressed to:

Benjamin Thompson, Assessor
Town of Gorham
75 South Street, Suite 1
Gorham, ME 04038
Tel: (207) 222-1603

GORHAM

MAINE



Prepared by:

Patrick Donovan of Vision Government Solutions, Inc.
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Fax: 508-351-3798
pdonovan@vgsi.com
www.vgsi.com

**RESPONSE TO THE REQUEST
FOR PROPOSALS FOR:**

Proposals for Revaluation Services

Due: February 6, 2020 at 4:00 pm

 **VISION**
GOVERNMENT SOLUTIONS

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February 6, 2020

Town Manager
Town of Gorham
75 South Street, Suite 1
Gorham, ME 04038

Dear Town Manager:

Vision Government Solutions is pleased to propose Revaluation services for Real Property to the Town of Gorham in response to your RFP. We have been in the Revaluation and Municipal software business for over 35 years and have both the personnel and financial resources to complete your project. Our proposal is fully compliant with Maine certification and IAAO Standards requirements.

In summary, it is our perspective that there is no firm better suited for the delivery of accurate and equitable values, positive taxpayer relations, and service level efficiency and quality than Vision. Here are three specific reasons why:

1. **Experience and Reputation:** There is no firm with more New England revaluation experience than Vision, with more than 200 projects completed in the past 5 years.

So many communities choose Vision because of our service quality, robust training programs, appraisal expertise, and Public Relations campaigns. The best evidence of that is the simple fact that more than 50 percent of our clients have been with Vision for more than 20 years. Firms with less diverse experience introduce the risk of inaccurate values, project timeline delays, and significant database errors that are costly to fix.

2. **Staffing and Reliability:** Unlike smaller firms with only a few staff members, Vision maintains 60 full-time appraisers on staff all the time. The best proof of our staff quality is in our retention rates, with 50% of our team having more than 20 years of experience at Vision. Specifically, we are proposing Steve Whalen as your Project Manager. Steve has extensive experience, over 30 years of revaluation experience.
3. **The Value of Integration with the Gorham CAMA Software:**

Vision's Appraisal Teams exclusively use our *Appraisal Vision*® CAMA software to conduct every revaluation. **There is no other vendor that has the level of experience on *Appraisal Vision*® version 6.5 and 8, then the Vision appraisal team.** This is

 **VISION**
GOVERNMENT SOLUTIONS

critical to the success of the project, as incorrect data entry changes to the CAMA database, inconsistent tables and mass updates can lead to massive data quality errors, causing project timeline delay, costly re-work, and significant public relations issues. In fact, there are many recent examples of communities using untrained mass appraisal vendors, who have incurred additional cost fixing data quality errors on the back-end of the project. At Vision, we put in place quality control procedures to eliminate these costly errors.

Because our appraisal staff are highly trained in using *Appraisal Vision*, we expect to be able to complete the project dramatically faster and more effectively than any other option.

Not only does that mean that Gorham is receiving the very best staff in the industry to ensure truly equitable and accurate valuations for the taxpayer community, but it also provides full staffing coverage to complete the project on time, no matter what. Smaller teams introduce significant risk to project timeliness and completion.

We look forward to the opportunity to discuss this project in further detail. We welcome you to contact or visit with the references that we have supplied to you in this proposal and thank you in advance for your consideration.

If we can be of any further assistance, please feel free to call. The Primary Contact for this Proposal is:

Patrick Donovan
Director of Appraisal Sales
T. 800-628-1013 ext. 3644
F. 508-351-3798

This proposal is good for 90 days.

Sincerely,



Kevin Bullock
Chief Financial Officer

**PROJECT COST
TOWN OF GORHAM, MAINE
2021 REVALUATION**

2021 Project Total

\$347,000

Three Hundred Forty-Seven Thousand dollars

Company: Vision Government Solutions, Inc.
Address: 1 Cabot Road, Hudson, MA 01749
Phone: 800-628-1013, Ext. 3693

Signature:



Name:

Kevin Bullock

Title:

Chief Financial Officer

BID PROPOSAL DOCUMENT

This document must be included in the bid package, clearly marked "BID PROPOSAL – PROPERTY REVALUATION"

<u>Service</u>	<u>Total Price</u>
Revaluation of all real property	\$ <u>347,000</u>
Internet Services during the revaluation public disclosure period	\$ <u>included</u>
Internet Services after revaluation (if applicable)	\$ <u>2,992 (1st year)</u>
Any other services available	\$ <u>n/a</u>
Additional support (if applicable)	\$ <u>1,200 per diem</u>

Bids shall include the following information (Indicate with a (X) in the left-hand column that they have been included in your response):

X	No.	Item
<input checked="" type="checkbox"/>	1.	Name and telephone number of person(s) to be contacted for further information and clarification.
<input checked="" type="checkbox"/>	2.	Listing of all municipal revaluations completed during the past five (5) years, including client contact, telephone number.
<input checked="" type="checkbox"/>	3.	Indication of number of years engaged as a company, corporation, partnership or individual specializing in governmental tax revaluation services.
<input checked="" type="checkbox"/>	4.	Name of project supervisor to be assigned to this project, along with his/her resume.
<input checked="" type="checkbox"/>	5.	Time schedule filled out according to the Contract Specifications.
<input checked="" type="checkbox"/>	6.	Staged fee payments filled out as listed in Contract Specifications.
<input checked="" type="checkbox"/>	7.	Rate per parcel of properties in excess of 100% filled out, as listed in the Contract Specifications.

BID PROPOSAL FORM TOWN OF GORHAM, MAINE

EXCEPTIONS & CLARIFICATIONS

1. **On-Site Inspections:** Vision will make an initial visit to all properties utilizing existing data from the Town. Vision will measure the exterior of improvements and attempt to perform an interior inspection. If after the initial visit, an interior inspection was not performed, a notification letter will be mailed. Appointments will then be arranged by phone for interior inspections. The company shall guarantee to make a careful inspection of the complete interior of all properties, excluding those wherein the owner refuses permission to inspect, unoccupied buildings, structures that are unsafe, inhabitants that appear dangerous or threatening, no response to the interior inspection letter or any other reason which the Assessor and company agree makes the property inaccessible. We have not included any data mailers as part of our proposal. We could provide pricing, should the town provide specifications.
2. **Imaging Services:** We have included a new image for each improved property in our proposal. Additional imaging services can be provided at a cost of \$2.50 per image. This cost includes the image capturing and the associated data entry into the CAMA system. We have not included a camera as part of our proposal. We could provide pricing, should the town provide specifications.
3. **Personal Property:** We have not included any Personal Property/Utility scope of services within our proposal price.
4. **Software/Hardware:** We have not included any software or hardware within our proposal and plan to utilize the towns Vision version 6.5 or greater CAMA system for the project.
5. **Weekly Updates to Taxpayers:** Vision can provide weekly updates to the public website to keep Taxpayers informed of the Revaluation project progression.
6. **Board of Assessment Review:** The Town will review all Board of Assessment Review requests as a result of the project and will require a Vision Senior Appraiser to support only those requests requiring a value decision. The process will be a combined effort of both the Town and Vision in an endeavor to effectively and expeditiously handle all appeal requests. Both staffs will work together to resolve any outstanding valuation issues. Any assistance by Vision personnel to Board of Assessment is included in our bid cost.
7. **Litigation:** We have included Five (5) days of Litigation support, any additional Litigation days, litigation preparation or Narrative Appraisal reports will be billed at the rate of One Thousand Two Hundred Dollars (\$1,200) per diem. We plan to utilize our Vice-President of Appraisal Operations, Mike Tarello, MAI /Certified Maine Assessor to perform this service.

G. SCHEDULE AND PERCENTAGE OF COMPLETED WORK

**Progress Report & Percentage of Completed Work:
(Recommended project percentages)**

CODE	TASK	**Please see attached**	% AMOUNT
100	Bonding, office set-up, project set-up, training, public relations		_____
200	Data collection, quality control, data entry		_____
300	Residential valuation and data mailers		_____
400	Commercial/Industrial valuation and data mailers		_____
500	Residential field review, data entry		_____
600	Commercial/Industrial field review, income production, reconcile cost and income		_____
700	Digital imaging, digital camera, documentation, hardware		_____
800	Impact notices, residential and commercial/industrial informal meetings, field work, data entry		_____
900	Project finalization, change notices, special land pricing, client meetings, goodwill		_____
1000	Support of values, goodwill		_____
1100	Fully operational system Vision interface with all workstations and peripherals		_____
TOTAL:			100%

III. RESPONSIBILITIES OF THE REVALUATION COMPANY

A. GOOD FAITH

The COMPANY 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 VIII(B) of the specifications.

B. PUBLIC RELATIONS

The parties to this revaluation PROJECT recognize that a good public relations program is required in order that the property owners and general public of the Town may be informed as to the purpose, benefits and procedures of the revaluation. The COMPANY shall, with the Assessor's approval, conduct a program of public information. The COMPANY shall participate in meetings 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 COMPANY shall supply visual aid and other media at its disposal to this end. The COMPANY shall be responsible for providing weekly public information notices advising citizens of the project's progress. All public information releases shall be approved by the Assessor prior to release. The COMPANY shall submit a detailed public relations plan to the Town within thirty (30) days of execution of the Contract.

Gorham, Maine
Price Breakdown

Description	Total Value
Project Supervision	\$ 15,401
Residential Valuation	\$ 9,375
Residential Measure & List	\$ 117,135
Residential Field Review	\$ 17,487
Crew Chief	\$ 16,455
Permits	\$ 2,743
Commercial Valuation	\$ 12,053
Commercial Measure & List	\$ 9,055
Commercial Field Review	\$ 4,018
Permits C/I	\$ 283
Digital Imaging	\$ 10,101
Digital Image Capture	\$ 4,663
Residential Hearings	\$ 8,728
Commercial Hearings	\$ 2,009
Training	\$ 274
Data Entry	\$ 23,328
Data Entry Printing	\$ 3,334
Project Finalization & Support	\$ 7,318
Letters/Mailings	\$ 11,021
Associated Project Expenses	\$ 62,102
Bonding	\$ 10,117
TOTAL APPRAISAL	\$ 347,000

CONTRACT SPECIFICATIONS

I. SCOPE OF THE REVALUATION PROJECT

A. The revaluation PROJECT requires the complete appraisal and revaluation of all real property, except where listed as "not included" in this contract specification, and all tax-exempt real property located within the corporate limits of the Town of Gorham. Of particular importance to the Town is the COMPANY'S experience using Vision software.

B. Within ten (10) days of the award of the PROJECT, the successful bidder shall be required to execute a professional services agreement with the Town of Gorham ("the Contract"). The contents of the Town's Request for Proposals/Contract Specifications and the proposal submitted by the successful bidder shall become a part of the Contract. The COMPANY that executes the contract with the Town shall furnish all labor, materials, supplies and equipment and shall perform all work for the project in strict accordance with the contract specifications.

C. The scope of the PROJECT shall be subject to the approval of the Town of Gorham. The Town Assessor shall have final approval of personnel, forms, records and materials utilized in this PROJECT. The PROJECT shall conform to the Standards and Qualifications defined in Rules of Maine Revenue Services.

D. The values to be determined shall be full market value as defined in the Maine Revised Statutes Annotated and Maine Supreme Court decisions. Basis of valuation shall be the recognized methods of appraising real property, as defined by the Appraisal Institute and the International Association of Assessing Officers (IAAO).

E. The PROJECT shall include the valuation of the following categories of property within the Town:

1. All taxable real property, including land, buildings and improvements.
2. All tax-exempt property. All decisions regarding the taxable status of any property shall be made by the Town of Gorham.

F. The effective date of this revaluation PROJECT shall be for the Assessment Date of April 1, 2021. Valuations and appraisal of all taxable and exempt real property shall reflect full market value for the Town's tax commitment that year.

G. Approximate number of accounts as of April 1, 2020 is as follows:

	Number of Properties
Residential Improved	5995
Residential Vacant	531
Residential Condominium Units	406
Mixed Use	2
Commercial Improved	152
Commercial Vacant	9
Industrial Improved	139
Industrial Vacant	20
Special Open Space	137
Regular Open Space	22
Total Accounts Taxable	±7,173
Exempts	160
Total Accounts Exempt	±160
Total Accounts	±7,600

H. Pertinent Town Data

1. Last revaluation was effective as of _____.
2. Estimated Population as of the most recent census is _____.
3. The total area of the corporate is ±____ square miles.
4. Estimated number of building permits per year: ±____ total (±____ new dwellings)
5. Estimated number of qualified sales per year ±_____.

II. GENERAL CONDITIONS

A. PROJECT AWARD

The Town of Gorham reserves the right to reject any part of, or all of each bid proposal; to waive informalities and technicalities; and to accept that proposal which the Town, in its sole, exclusive judgment, deems to be in the best interest of the Town. Proposal price shall be a consideration, but lowest dollar cost proposal shall not be the sole criteria to be considered. The Town will evaluate each proposal based on the documentation requested herein, and proposals will be scored using criteria that include, but are not necessarily limited to, the following: (1) experience providing residential, commercial and industrial revaluation services in Maine; (2) ability to perform the scope of work by August 1, 2021; (3) experience working with Appraisal Vision CAMA software; (4) price; (5) the written proposal; (6) quality and experience of the COMPANY'S personnel; (7) the nature and size of the COMPANY; (8) client references; (9) an oral presentation (if requested); and (10) the quality of similar projects performed by the COMPANY in the past.

B. COMPANY

1. Certification

Each company, corporation, partnership, or individual must hold from the time of submission of the proposal through the completion of all work hereinafter required, written certification of approval by the State of Maine, Maine Revenue Services to provide revaluation services in the State of Maine.

2. Proposal

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

C. PERSONNEL

The COMPANY shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of federal and State law. The COMPANY shall submit to the Town written qualifications of all personnel assigned to this project in the form of a resume. All personnel assigned to this project shall be subject to the approval of the Assessor and shall be caused to be removed from this project by the COMPANY upon written recommendation of the Assessor.

1. Office Space, Hours, Staffing

The Town will furnish the COMPANY sufficient office space and necessary office furniture and allow access to telephones and copier equipment to carry out the terms of this contract. The COMPANY shall be responsible for all associated phone costs and copier expenses. The COMPANY shall inform the Assessor of the availability of the contract representative.

2. Minimum Qualifications

The COMPANY shall employ personnel in such positions as necessary to execute the provisions of this PROJECT. Said personnel shall, at a minimum, possess the minimum qualifications as established by the Rules of the Maine Revenue Services.

- a. The project supervisor shall have at least five (5) years of appraisal experience, review appraisers shall have at least three (3) years of appraisal experience and measurers and listers shall have at least one (1) year of appraisal experience. The COMPANY must provide evidence that they employ at least one certified Maine assessor as described in 36 M.R.S.A. §§ 310 and 311.

- b. One measurer and lister trainee may be used on the project for each two experienced measurers and listers used but must be under the direct supervision of a measurer and lister with at least two years of appraisal experience.
- c. One review appraiser trainee may be used on the project under the direct supervision of the project supervisor. It is expressly understood that a minimum number of review appraisers shall be used on the project and that, whenever possible, the job supervisor shall be the sole review appraiser.

3. Identification

All field personnel shall carry suitable I.D. cards, which shall include an up-to-date photograph, supplied by the COMPANY. All automobiles used by the field personnel shall be recorded with the Town of Gorham, giving license number, make, model, year and color of the vehicle. The COMPANY will cause pictures of its listers to be published in the local media in order to identify them as legitimate members of the revaluation team. In the event of rotation of personnel, new pictures will be published.

4. Conflict of Interest

No resident or employee of the Town shall be employed by the COMPANY on this project without the express permission of the Assessor and the Town Manager.

D. PROTECTION OF THE TOWN

1. Bonding

The COMPANY shall, to secure the faithful performance by the COMPANY of the terms of the CONTRACT, furnish to the Town of Gorham a Performance Surety Bond within fifteen (15) days of the execution of the CONTRACT, in the amount of the CONTRACT, which bond shall be issued by an admitted bonding company licensed to do such business in the State of Maine within an A.M. Best Company rating of "A+" or better. Said bond shall be delivered to Town of Gorham prior to the commencement of actual work and shall be in a form satisfactory to and approved by the Town. This bond shall secure performance of all the COMPANY'S obligations under the contract including the COMPANY'S obligation to address abatement applications for the April 1, 2021 assessments under Section VIII(B) of the contract specifications.

2. Indemnification and Insurance

- a. The COMPANY agrees to defend, indemnify and hold harmless the Town, its officers, agents and employees against all claims, demands, payments, suits, actions, recovery and judgments of every kind and description arising out of the performance of the Contract by reason of any negligent or tortious action or omission of the COMPANY, its agents or employees.
- b. The COMPANY shall not be responsible for consequential damages arising from the late performance or non-performance of the Contract caused by circumstances that are exempt from liquidated damages under Section II(D)(3) of these specifications.

- c. The COMPANY shall maintain public liability insurance, automobile liability insurance and workers' compensation insurance (in an amount required by statute).
- d. The public liability insurance shall be in the form of commercial general liability with the inclusion of contractual liability coverage and shall provide limits of \$1,000,000 per occurrence, \$2,000,000 aggregate.
- e. The automobile liability insurance shall be in the form of comprehensive automobile liability and shall provide limits of \$1,000,000 per occurrence, \$2,000,000 aggregate.
- f. The COMPANY shall carry valuable papers insurance on any and all records applicable to the project against the loss or destruction of such records in an amount of not less than the contract price.
- g. The COMPANY shall not deny liability because of any legal defense to which the municipality is entitled by reason of being a municipality.
- h. The COMPANY shall provide to the Town:
 - (1) Certificates of insurance, written by an insurer licensed in the State of Maine, confirming that the required insurance coverage is provided to the Town and showing the Town as an additional insured on the liability policy; and
 - (2) A ten (10) day written notice of the cancellation or material change in the required insurance coverage.

3. Liquidated Damages

Failure of the COMPANY to complete all work prior to the date specified herein, August 1, 2021, shall be cause for a payment from the Company on the request of the Town in the amount of ONE HUNDRED DOLLARS (\$100.00) per working day beyond the specified date of completion. Any liquidated damages may be deducted from the contract sum owed the company. For the purpose of this liquidated damages provision only, completion of all work is defined to include all of the following:

- Completed data collection cards with all measurements and listings.
- Completed review documents.
- Completed informal meetings and post-informal meeting corrections.
- Completed sales analysis.
- Completed final valuations and total work product delivered.
- CAMA system in place, data loaded and fully operational.

These liquidated damages, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, or acts of God or an order of court of competent jurisdiction are exempted.

E. COMPLETION DATE AND TIME SCHEDULE

1. Changes and Assignment of Contract

a. Revisions, Modifications and Assignment

The COMPANY shall not change, modify, assign, transfer, delegate or sublet the CONTRACT, or any interest or part therein, without first receiving written approval from the Town, the Maine Revenue Services and the bonding company. It shall be mutually agreed and understood that said consent by the Town shall in no way release the COMPANY from any responsibility or liability as covered in these specifications and the Contract.

2. Time Schedule

- a. Revaluation work shall start in the Town no later than thirty (30) days after signing of the Contract but no site visits will take place until after April 2, 2020.
- b. All corrected and finalized appraisal cards shall be completed and turned over to the Town no later than August 1, 2021, at which time CAMA data shall be fully loaded, tested and operational on the Town's computer system.
- c. The COMPANY will provide a comprehensive schedule of the project that meets the August 1, 2021 delivery date.
- d. The completed appraisals, upon approval of the Assessor will be the basis for the assessment date of April 1, 2021. All data contained on the appraisal cards and the software package shall reflect the assessment date of April 1, 2021.

F. PAYMENT SCHEDULE

Payments shall be made in the following manner: Thirty (30) days after the execution of the CONTRACT, and thereafter within ten (10) days of the end of each succeeding month, the COMPANY shall forward to the Assessor an invoice of work completed during the thirty (30) day period of the preceding month. Such invoice will itemize and accurately indicate the extent and nature of the work performed by volume, street, and category or in any other manner required by the Assessor. All monthly progress reports and work completed will be subject to the review and approval of the Assessor. Payment shall be within 30 (thirty) days of invoice date.

Upon the Assessor's determination that the invoice accurately portrays the work performed during the previous month, a percentage payment, representing ninety (90%) of the proportion of the total work completed for that month shall be paid to the COMPANY.

The COMPANY shall submit with its proposal the completed schedule and percentage of completed work showing the fee breakdown activity as listed as Section II(G) of these specifications, SCHEDULE AND PERCENTAGE OF COMPLETED WORK.

Ten percent (10%) of the total CONTRACT amount shall be withheld until such time as the Assessor determines that the COMPANY has performed fully and satisfactorily all of its obligations and requirements under the contract.

G. SCHEDULE AND PERCENTAGE OF COMPLETED WORK

**Progress Report & Percentage of Completed Work:
(Recommended project percentages)**

CODE	TASK	% AMOUNT
100	Bonding, office set-up, project set-up, training, public relations	_____
200	Data collection, quality control, data entry	_____
300	Residential valuation and data mailers	_____
400	Commercial/Industrial valuation and data mailers	_____
500	Residential field review, data entry	_____
600	Commercial/Industrial field review, income production, reconcile cost and income	_____
700	Digital imaging, digital camera, documentation, hardware	_____
800	Impact notices, residential and commercial/industrial informal meetings, field work, data entry	_____
900	Project finalization, change notices, special land pricing, client meetings, goodwill	_____
1000	Support of values, goodwill	_____
1100	Fully operational system Vision interface with all workstations and peripherals	_____
TOTAL:		100%

III. RESPONSIBILITIES OF THE REVALUATION COMPANY

A. GOOD FAITH

The COMPANY 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 VIII(B) of the specifications.

B. PUBLIC RELATIONS

The parties to this revaluation PROJECT recognize that a good public relations program is required in order that the property owners and general public of the Town may be informed as to the purpose, benefits and procedures of the revaluation. The COMPANY shall, with the Assessor's approval, conduct a program of public information. The COMPANY shall participate in meetings 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 COMPANY shall supply visual aid and other media at its disposal to this end. The COMPANY shall be responsible for providing weekly public information notices advising citizens of the project's progress. All public information releases shall be approved by the Assessor prior to release. The COMPANY shall submit a detailed public relations plan to the Town within thirty (30) days of execution of the Contract.

C. CONDUCT OF COMPANY EMPLOYEES

As a condition of the CONTRACT, the COMPANY's employees shall at all times treat the residents, employees and taxpayers of the Town of Gorham with respect and courtesy; the COMPANY shall take appropriate and meaningful disciplinary measures against those COMPANY employees who violate the terms of this provision.

D. RECORDS

1. General Provisions

The COMPANY shall provide all appraisal cards, computer supplies, office supplies, equipment, forms, and literature at its sole cost and expense. The Town shall make available all current computerized Assessor records.

2. Records are Town Property

The original or a copy of all records and computations, including machine readable databases, made by the COMPANY in connection with any appraisal of property in the Town shall at all times be the property of the Town and upon completion of the PROJECT or termination of the 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, the following: 1) tax maps; 2) land value maps; 3) materials and wages, cost investigations and schedules; 4) data collection cards, final property record cards with property valuations and separate sketch cards (if any); 5) cost sheets; 6) comparable sales data and analysis; 7) capitalization rate data; 8) depreciation tables; 9) computations of land and building values; 10) written communications with individuals or groups explaining methods used in appraisals; 11) operating statements of income properties; and 12) photographs.

3. Assessor's Records

The COMPANY shall use a system approved by the Assessor for the accurate safe keeping and accounting of all records and maps, which may be taken from the files of the Assessor in connection with appraisal work. All such records and maps shall be returned immediately. None of the Assessor's records shall be taken outside of the corporate limits of the Town without prior permission of the Assessor except in the case of digital copies.

4. Appraisal Cards

The COMPANY shall complete field record cards, commonly referred to as "Data Collection Cards" filed by the map/lot number. These cards shall contain all manner of information affecting value, including, but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, and with a breakdown of front feet, square feet and acreage, public utilities available, public improvements and zoning designations in effect as of the assessment date. All physical improvements shall be measured giving a listing of all interior and exterior construction details. Quality of construction, age and condition will be shown. The COMPANY shall also provide a set of cards commonly referred to as "final property record cards". These cards shall contain all information collected at

the property as well as all information necessary to the valuation process. This information shall be computer generated and will include the sketch of the dwelling along with all-physical data, replacement cost, depreciations, grade, age, condition and fair market values of the land and buildings. These records shall be filed by map/lot.

5. Sketches

Sketches of all major buildings shall be drawn to scale with dimensions given on the data collection card or on a separate card. Final property record cards shall have all sketches printed to scale. The CAMA system shall provide an interactive link between the sketch program and cost tables to arrive at structure values.

E. ASSESSMENT NOTICES

Before the close of the revaluation, a notice shall be sent, at the COMPANY'S expense, by first class mail, to each owner of record, setting forth the new valuation that has been placed upon the property identified in the notice. The COMPANY will provide the needed information for the notice. Also enclosed will be a letter specifying the dates, times and location of the informal meetings. Such notices and letter shall be subject to approval by the Assessor and shall include the appeal procedures available to taxpayers.

F. INFORMAL MEETINGS/BOARD OF ASSESSMENT REVIEW

At a time mutually agreeable to the Assessor and the COMPANY but not later than August 1, 2021, the COMPANY shall hold informal meetings so that the owners of property, or their legal representatives, may appear at specified times to discuss with qualified members of the COMPANY'S staff, the assessed valuations of their property. The COMPANY'S personnel shall explain the manner and methods of arriving at value. The COMPANY, with the approval of the Assessor, shall schedule a sufficient number of informal meetings in order to expeditiously and fairly handle all taxpayer inquiries as pertains to the assessment of their property. The Assessor or Assessor's designated representative may attend any or all informal meetings. Any information offered by the taxpayers shall be given consideration and adjustments shall be made where warranted. After the informal meetings, the COMPANY shall be responsible for sending a updated notice to each taxpayer or his or her representative who appeared at an informal meeting seeking a review of the assessment; provided, however, that it is specifically understood that in fixing the assessed values of properties within the Town, the Assessor shall exercise full and final judgment and that all appraisal and revaluation services performed by the COMPANY shall always be in an advisory capacity to the Assessor for the express purpose of furnishing information to the Assessor to enable the Assessor to arrive at a fair and just value of all property within the Town. Such notice shall include the adjusted assessment or a statement that no change is warranted. In the event the owners of the property are not satisfied with the results of the informal meeting and take an appeal to the Board of Assessment Review, the COMPANY will provide qualified personnel to attend the Board of Assessment Review hearing(s) in defense of the assessment upon request by the Town Assessor.

G. INFORMATION

Throughout the appraisal process, the COMPANY shall satisfy all requests made by the Assessor for information as to the COMPANY'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 throughout the duration of the PROJECT.

H. BUILDING COST SCHEDULES

1. General

The COMPANY shall prepare for usage in the program as hereinafter specified, building cost schedules. Said schedules will reflect the square foot cost method based upon the square foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial and industrial 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 the construction. Before final acceptance, they shall be documented and proven by testing against known sales. All finalized schedules shall be approved by the Assessor before adoption and usage of the COMPANY.

All documentation utilized in the investigation of local costs, labor costs, labor rates, material costs, depreciation rates, etc. utilized to compile the cost schedules shall become the property of the Town.

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, garages and schedules for other building improvements usually found on residential property (e.g., swimming pools, barns, sheds, tennis courts).

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 the base specifications.

c. Industrial and Special Structures

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

d. Outbuildings

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

3. Physical Depreciation Schedules

Physical 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 and farm buildings. Functional and economic obsolescence, if any, shall be analyzed and calculated on an individual property basis using generally acceptable methods and techniques.

4. Schedules for Town

The COMPANY shall supply and leave for the Town not less than three (3) copies of all the above required building cost schedules and depreciation schedules for Town usage, one copy of which shall be turned over to the Assessor upon approval of the schedules.

IV. APPRAISAL SPECIFICATIONS

A. APPRAISAL OF LAND

The COMPANY shall appraise all residential, commercial, industrial, agricultural, special use and exempt and non-taxable land within the Town. The Town shall provide two (2) sets of maps, including tax, zoning and wetlands maps and information regarding variances and special exceptions (conditional uses) granted by the Town.

1. Land Inspection

The COMPANY shall be responsible for being familiar with each plot or lot, noting topographical irregularities, wetlands, soil conditions, shape or any other factors that may affect the use or value of the property.

2. Land Value Study

Land value shall be determined on the basis of highest and best use.

- a. Vacant land sales data shall be analyzed on all sales, at a minimum, for arms-length transactions occurring during the two (2) years prior to April 1, 2021.
- b. Improved property sales data shall be analyzed, at a minimum, for arms-length transactions occurring during the two (2) year period prior to April 1, 2021, in order to estimate land values by the residual method.
- c. Zoning designation shall be noted on each property, and the results of (a) and (b) above shall be organized and presented in a format stratified by zone designation.

- d. The analysis and application of sales data shall be governed by procedures and techniques approved by the Assessor.
- e. The COMPANY shall consult owners, realtors, banks, appraisers and other sources for information relative to land values in the Town.
- f. The COMPANY shall consider factors affecting land value, such as location, zoning, available utilities, size, shape, topography, view, improvements, special exceptions (conditional uses) or zoning variances, non-conforming uses, flood plains, special purpose uses, and form of ownership.
- g. All factors affecting value and valuation computations, including but not limited to those listed above, shall be entered on the master file and the appraisal cards.

3. Land Value Unit

The Assessor, in consultation with the COMPANY from its recommendation, shall determine what type of land unit value shall be used for the various types of property and various locations. The front foot, square foot, acreage, fractional acreage and per lot units shall be considered, among other possibilities.

4. Land Value Map

The COMPANY 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 revaluation PROJECT.

5. Neighborhood Delineation

After consideration of the environmental, economic and social characteristics of the Town, the COMPANY shall, with the cooperation and approval of the Assessor, delineate "neighborhood" units within the Town. Properties within each neighborhood unit will exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. Neighborhood numbers shall be recorded and maintained on street cards, Town maps and the computer database.

B. APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES

All residential buildings shall be inspected, classified, priced and reviewed to include the 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. The COMPANY will be responsible for the conversion of all data elements stored on the Town's current appraisal master file. This conversion can be performed either electronically or manually at the COMPANY'S discretion.

1. Interior Inspection

- a. The COMPANY shall guarantee to make a careful inspection of the complete interior of all properties except for the following conditions:
 - Unoccupied buildings
 - The owner has refused entry to the property
 - Structures that are deemed unsafe by the Assessor and COMPANY
 - Inhabitants that appear hostile, dangerous or threatening
 - No response to the notification letter
 - Any other reason which the Assessor and COMPANY agree makes the property inaccessible
- b. Properties with owners who have not answered COMPANY letters requesting an appointment for inspection will also be excluded from the total number of properties in computing the 100% figure.
- c. The lister shall have each interior inspection verified, including the date of inspection, by having an adult owner or resident 18 years or older of each building or dwelling unit sign the field card.
- d. When entrance to a building for inspection is refused, the lister shall make note of the fact and shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and make adequate notations of the lack of cooperation and the manner of arriving at value, conspicuously on the card.
- e. The listing card shall indicate the initials of the lister and the date of the listing.
- f. Where necessary, if no contact has been made with the property owner, the COMPANY shall make one (1) call back which will either be on a weekday after 5:00 p.m. or on a Saturday. The time and date at which the call back was made shall be duly noted on the field record card by the lister making such a call back.
- g. If after two (2) attempts, contact was not established with the property owner, a notification letter approved by the Assessor, shall be mailed, notifying the property owner that the representative of the COMPANY was not able to make contact. The notice will request that the property owner contact the COMPANY by mail for alternative arrangements for the inspection of the property. Refusals and lack of response to the COMPANY'S letter shall not be counted in the category of non-inspected properties.
- h. In the event that no interior inspection is possible, the lister should honor the privacy of the homeowner and not attempt to ascertain the condition and quality of a structure's interior by looking through doors or windows. In these cases, observation should be limited to what casually can be observed from the street with the naked eye unaided by any mechanical, electrical or optical devices.

2. Exterior Inspection

- a. The perimeter of all residential buildings and improvements shall be carefully measured. The COMPANY is responsible for the accuracy of all exterior information.
- b. All buildings shall be measured to the nearest one-foot. Story heights of the various sections and subsections shall be noted on the property record card.
- c. An outline sketch, prepared to scale, shall be made for each parcel.
- d. Physical data of the parcel shall be verified from existing records and recorded at the site.

3. Review

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

4. Valuations

- a. Valuations of all land and buildings must reflect the fair market value as of April 1, 2021, and shall be done from and in accordance with the Assessor' approved manuals and schedules.
- b. The final valuation shall be the market value of the structures plus the market value of the land. In arriving at the market value of the structures replacement cost less depreciation from all causes may be considered along with other factors affecting the value of the property, all of which shall be noted on the appraisal card.

5. Sales Analysis

Prior to the data verification phase of this project, a sales analysis program of residential properties shall be performed as a means of determining the schedule levels to be utilized in the project and for substantiating the neighborhood boundaries and groupings established. This analysis shall be done on the aggregate of all residential properties and on each of the neighborhoods previously delineated. The sales analysis shall include, at a minimum, sales ratios and coefficients of variation or dispersion. Additional requests for sales ratio studies by the Assessor shall be performed. The sales analysis shall be in the same manner as that used by Maine Revenue Services in the State Valuation.

C. APPRAISAL OF COMMERCIAL, INDUSTRIAL AND SPECIAL PURPOSE PROPERTIES

1. General

All commercial, industrial and special purpose buildings shall be inspected, classified, priced and reviewed in the same manner as residential properties as set forth above, and the dimensions of all buildings shall be to the nearest foot and the height of the building shall also be recorded on

the property record card and the master file. All buildings shall be identified and described as component parts of construction, size, area, age, usage and present occupants on the property forms as previously provided in these specifications.

2. Income Approach

- a. Income and expense data shall be gathered by the COMPANY on forms approved by the Assessor, which shall become the property of the Town at the completion of the PROJECT. This information shall not be a public record.
- b. The COMPANY shall develop, with the involvement of the Assessor, capitalization rates and gross rent multipliers by interviews with bankers, investors, realtors and appraisers. This information shall be documented in writing and provided to the Assessor.
- c. The COMPANY shall determine market or economic rents and expenses and applicable capitalization rates and/or gross rent multipliers for various classes of commercial property. The COMPANY shall document, in writing, the sources of this information, describe its analysis in determining these values and provide this documentation to the Assessor.
- d. The COMPANY shall perform the income approach by the accepted methods of capitalization. Gross rent multipliers shall be used as an additional valuation check where applicable.
- e. The COMPANY shall mail income and expense questionnaires all responses to the questionnaires shall be returned to the COMPANY, but shall be the property of the Town at the completion of the PROJECT.
- f. All information gathered, received or used by the COMPANY to develop values using the income approach must be given to the Assessor at the end of the PROJECT or upon request.

3. Plat Plan

A plat plan shall be made of all commercial and industrial properties where more than one building is present showing the location of and identification of the buildings and yard improvements.

4. Yard Improvements

All yard improvements shall be listed and valued separately.

5. 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, to the satisfaction of the Assessor, in the appraisal of the particular type and kind of

commercial, industrial or special purpose building; the final value of which he or she is responsible.

D. APPRAISAL OF CONDOMINIUMS

1. Residential and commercial condominiums shall be valued by the direct market comparison approach. For each complex there shall be a master card, showing the project diagram and assessed values for each unit type and each unit as well as a final property record card for each unit.
2. All residential and commercial condominiums shall be valued using the same procedures as described above in these specifications.

E. CONTROL AND QUALITY CHECKS

1. Field Checks

The Assessor shall conduct spot checks in the field on properties chosen at random by the Assessor, with or without the assistance or knowledge of the COMPANY supervisor.

2. Building Permits

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

3. Incomplete Construction

The COMPANY shall designate on the master file each property which has incomplete improvements as of April 1, 2021. The final card shall list all improvements, show the percentage of completion of all improvements and reflect the percentage of completion in the valuation as of that date.

4. Accuracy.

The COMPANY'S revaluation work shall be sufficiently accurate to achieve a minimum assessment ratio of 95% and a maximum quality rating of 10 for all major categories of taxable properties when evaluated by the State Tax Assessor pursuant to 36 MRSA sec. 327 upon filing of the Town's annual return under 36 MRSA sec 383 for tax year 2021-2022. In the event the COMPANY'S work fails to achieve the required assessment ratio or quality rating with respect to one or major categories of taxable properties, the COMPANY shall perform all necessary corrective work to achieve the required standards at no additional charge. Major categories of taxable property shall consist of commercial, industrial, residential and waterfront properties.

V. COMPUTER ASSISTED MASS APPRAISAL (CAMA)

A. GENERAL REQUIREMENTS

1. Of particular importance to the Town of Gorham is the COMPANY's experience in performing computerized revaluations and statistical studies, using Vision 6.5 or a newer version in use by the Town of Gorham.
2. The COMPANY will provide:
 - a. Statistical analysis by market stratification; ratio studies and coefficients of dispersion by total sampling, geo-districts and by property type or use and by age of improvements.
 - b. Administration studies such as total land valuations and total valuations by Town-wide, districts and property types or uses, including taxable and exempt properties.
3. The computer applications must be employed by the COMPANY from the very onset of the revaluation program, in order that the system output will support the final product. Development of the final database will be a joint venture of the Town and the COMPANY.

B. COST APPROACH MODULE SPECIFICATIONS

1. This CAMA module includes data management and cost valuation components for commercial, industrial and residential properties. It produces a valuation document showing the cost calculations on each property, the appraisers' adjustments and final value determination. The module accesses a maintainable table of replacement cost formulas and depreciation schedules which are keyed to a structure code (indicating what the improvement was built as or designed to be used for). It provides for correlation of the cost approach with the market approach through the use of economic condition factors as well as the standard depreciation for age, condition and functional obsolescence.
2. The system computes value estimates based on standard appraisal methodology (acceptable by the IAAO and the Appraisal Institute) with clear documentation for non-automated value computations and defense of values. All cost schedules are to be determined by the COMPANY and approved by the Assessor. The basic residential classification system shall identify property within frame type, quality class and floor area as a minimum. Also, values must be responsive to effective age. The component costs shall be easily understood in terms of cost new, depreciation and land rate schedules.
3. The system provides for online updating of the data management file with the cost estimates. This includes the capability in the years following the revaluation of pricing any additions or new outbuildings through the cost approach and adding the depreciated value to the market-generated solution. This function will offer increased versatility after the revaluation.
4. The land pricing function shall utilize Computer-Assisted Land Pricing tables to provide location and land-use indexing for mass updating of land values. Land pricing should also have the ability to utilize preferential unit land values in addition to market-based unit land values.

5. Computed cost values for key fields shall be stored on a value history file of record. These would include Replacement Cost New (RCN) of each structure, Replacement Cost New Less Depreciation (RCNLD) of each structure, land value, physical depreciation by structure and functional/ economic depreciation by structure. The cost estimates shall be fully integrated with the market approach subsystem to develop reports to study depreciation schedules, land rate schedules, neighborhood factors, date of sale adjustments and certain cost adjustment factors. Cost schedule additions shall not require program modifications. New codes can be added by updating cost schedules and data management libraries.

6. The system is capable of calculating both the ad valorem and market value, specifically dealing with current use.

C. MARKET APPROACH MODULE SPECIFICATIONS

The market approach CAMA module provides for data screening, segmented analysis, market model generation, model evaluation, value predictions, comparable selection, adjustment of comparables and filed review reports.

The market module shall produce market value estimates using comparable sales. It shall include the ability to extract sold properties from the master file and build a sales history file for sales analysis purposes. For each improved residential property to be valued, the computer shall select from the sales history file (3-5) comparable properties, which have sold recently.

The comparable properties will be chosen from the same neighborhood unit or area similar to that of the subject. The system includes the ability to analyze sales ratio statistics by neighborhood unit as well as class. This shall provide the necessary information to make comparisons between classes and locations and identify categories with significant differences in value level or variance. These categories can then be checked to determine if adjustments are required.

D. SPECIFICATIONS FOR INCOME APPROACH MODULE

The income approach module contained in the system shall perform valuation by income capitalization. All real property containing more than four income-producing units shall be valued by the income approach. Information pertaining to income, rents, and expenses and financing shall be obtained on forms provided by the COMPANY and approved by the Assessor. This information shall be entered by the COMPANY into the CAMA system. Methods of capitalization shall include mortgage equity or discounted cash flow but not building residual techniques. The Assessor shall be involved in the development of capitalization rates to be utilized. All confidential income and expense data described in this section shall become the property of the Town. All conclusions drawn by the income approach shall be supported by sales data.

E. MISCELLANEOUS PROVISIONS

1. Warranties

- a. The COMPANY represents and warrants to the Town that it will use the software and documentation in accordance with the terms of the CONTRACT.

- b. The COMPANY shall warrant that it will comply with all issues relating to software ownership or as to any patent, copyright or trade secret infringement.
- c. The COMPANY represents and warrants that any services provided by the COMPANY hereunder shall be rendered in a professional manner by qualified personnel trained and skilled in the performance of the specific service involved and that the COMPANY shall employ qualified personnel in such positions as are necessary to execute or to fulfill all the terms and conditions of the Contract and that such personnel shall possess the minimum qualifications as established in Rules of Maine Revenue Services.
- d. The COMPANY represents and warrants that all goods, materials, hardware, software and services provided hereunder shall be in conformance and compliance with all applicable Federal, State and Local laws, administrative and regulatory requirements and any other authorities having jurisdiction over the subject matter of the Contract.

F. TRAINING, DOCUMENTATION AND MAINTENANCE

- 1. The COMPANY agrees to provide to the Town, at no additional charge, copies of all documentation for the valuation system by no later than the completion date of the project. The documentation shall include comprehensive user manuals, which clearly explain data collection, data entry and all appraisal operations, systems and functions and other support material.
- 2. The COMPANY agrees to provide to the Town, at no additional charge, comprehensive training in use, operation and technical aspects of the system and the COMPANY'S appraisal process on Town premises. Such training shall be sufficient so that the Town personnel shall be able to operate and understand the use and operation of the system and the appraisal process.

VI. RESPONSIBILITIES OF THE TOWN

A. NATURE OF SERVICE

It is understood and agreed that the services rendered by the COMPANY are in the nature of assistance to the Assessor and all decisions as to final valuations shall rest with the Assessor.

B. COOPERATION

The Assessor, the Town and its employees will cooperate with and render all reasonable assistance to the COMPANY and its employees throughout the revaluation process.

C. ITEMS FURNISHED BY THE TOWN

The Town shall furnish the following:

1. Maps

The Town shall furnish two (2) sets of updated tax maps showing streets, property lines, and parcel identification numbers. Maps shall be turned over within thirty (30) days of execution of the contract.

2. Land Dimensions

The Town shall make available lot sizes and total acreages to the COMPANY whenever available, and reasonable estimates where the information is not available. The Town shall also provide assistance during informal reviews to resolve discrepancies due to land sizes, boundaries, etc.

3. Zoning

The Town will provide two (2) sets of current Town zoning regulations and zoning maps, as well as information regarding variances and special exceptions (conditional uses) granted by the Town.

4. Property Transfers

The Town shall notify the COMPANY, on a regular basis, of property splits and transfers occurring after the initial file build by the COMPANY. The COMPANY shall update appraisal cards and the master file as necessary.

5. Building Permits

The Town shall make available copies of all building permits issued during the course of the revaluation project up to April 1, 2021.

6. Signing of Communications

The Assessor and the COMPANY'S project manager shall sign communications to be mailed at the COMPANY'S expense, for the purpose of contacting a property owner for inspection of the property and to obtain income and expense information for the income approach to value commercial properties, personal property inventories and other necessary and appropriate procedures.

7. Mailing Address

The Town shall make available, through the Assessor's office, the current mailing address of all property owners.

VII. TRANSMITTAL OF RECORDS TO THE ASSESSOR

The COMPANY shall make periodic delivery of appraisals to the Assessor for review in accordance with a schedule agreeable to the Assessor and the COMPANY. All completed and corrected records shall be turned over to the Town by August 1, 2021. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were inspected in order that the final appraisal of property shall be appraised as of April 1, 2021. All appraisals must be accepted by the Assessor before the PROJECT can be considered complete. All information, appraisals and records shall not be made public until after the informal meetings, 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 the CONTRACT shall conform to the procedures and technical requirements of the Assessor.

VIII. GENERAL CONDITIONS

A. CANCELLATION AND MATERIAL BREACH

If the COMPANY 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 COMPANY shall make any 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 hereunder to terminate the CONTRACT and withhold any payments due.

Should the COMPANY fail to fulfill, in a manner deemed timely and satisfactorily to the Town, its obligation under the CONTRACT, or if the COMPANY should violate any of the material covenants, conditions or stipulations of the CONTRACT, which failure or violation shall continue and is not cured for thirty (30) days after written notice and description of said failure or violation is provided by the Town and is received by the COMPANY; then the Town shall have the right to terminate the CONTRACT by giving written notice to the COMPANY of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination; and the COMPANY shall remain liable for the breach of the CONTRACT by the COMPANY.

If this termination clause is invoked, the COMPANY'S agents and employees shall, at the Assessor's direction, vacate the office space provided by the Town in an orderly fashion, leaving behind all records, properly filed and indexed, as well as all other property of the Town, in good condition. 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 cost in obtaining another contractor and supervising the transition. To the extent that any funds held by the Town under the CONTRACT do not cover the Town's costs to obtain another contractor and to supervise the transition, the COMPANY shall be liable to the Town to reimburse the Town for such costs. Termination of the CONTRACT and retention of funds by the Town shall not preclude the Town from bringing an action against the COMPANY before an arbitrator requesting damages or exercising any other legal, equitable or contractual rights the Town may possess in the event of the COMPANY'S failure to perform, including but not limited to, recovery costs and attorney's fees.

B. DEFENSE OF VALUES

For all requests for abatements or appeals of April 1, 2021 assessments, the COMPANY will work in accordance with the following procedures:

1. Upon receipt of all abatement requests of April 1, 2021 assessments, qualified personnel will review the applications and make recommendations to the Assessor on whether the valuation should be modified or remain as is.
2. If necessary, the COMPANY will participate in negotiating sessions with aggrieved applicants during an agreed upon time period in an attempt to settle the dispute.
3. If the assessing officials reduce the value of a property as part of the proceedings, the COMPANY shall still be responsible to support the reduced value.

4. If the assessing officials increase any value estimated by the COMPANY, the COMPANY shall not be responsible for providing a representative to support the adjusted value.

5. If the property owner is dissatisfied with the outcome of the informal meetings and related negotiations, qualified COMPANY personnel will provide testimony in support of the value at the local Board of Assessment Review.

6. Qualified COMPANY personnel will provide attendance and/or testimony at the State Board of Property Tax Review and prepare supplemental reports as necessary. The Town shall provide a minimum of twenty (20) days' notice to the COMPANY to provide such personnel for any such required attendance and/or testimony. The COMPANY will provide attendance and/or testimony, court support and preparation for five (5) days at no additional cost to the Town.

7. The COMPANY agrees to assume all costs for services rendered by it in connection with any hearings or reviews to the level of local board of assessment review or the state board of property tax review provided the filing of such hearing or review is commenced within one (1) year after the current commitment date representing the values resulting from the contract.

C. EXCUSABLE DELAYS

In no event shall either party be liable to the other for any delay or failure to perform which is due to any act of God, or actions of civil or military authorities, civil disturbance, wars, strikes, fires, natural catastrophes or other similar causes beyond the control and without the fault or negligence of the party claiming excusable delays.

D. DISPUTE RESOLUTION

Except as otherwise agreed by the parties in writing, all disputes, controversies, claims, counterclaims and other matters in question between the Town of Gorham and the COMPANY arising out of or relating to the CONTRACT shall be decided by a Maine court of competent jurisdiction. The CONTRACT is made and shall be construed under the laws of the State of Maine except any choice of law rule that may direct the application of the laws of any other nation or jurisdiction. Except as otherwise expressly agreed by the parties in writing, exclusive venue for any such civil action shall be in Maine Superior Court (Cumberland County).

E. DELIVERABLE PRODUCTS

All documents, records, data and other material, in either manual, mechanized or electronic form, procured or produced in the performance of the PROJECT will be the sole property of the Town at the conclusion of the PROJECT, as determined by the Assessor. The documents, records, data and other materials shall include, without limitation, the following:

1. Documentation of procedures used throughout the PROJECT;
2. All materials and manuals used in any phase of the PROJECT;

3. The data collection and valuation manuals which will enable the municipality to maintain and update values;
4. Detailed valuation manuals, including tables and formulas to be used in applying the cost, sales comparison and income approach schedules;
5. Source information used in the development of cost, sales comparison and income approach schedules;
6. A property field inspection card (field data source document used by data gatherers) and a final computer generated property record card for each parcel;
7. All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties;
8. All sales ratio studies used in the project;
9. Field review documents reflecting preliminary values, adjusted preliminary values and any notes relative to informal review actions; and
10. A report of all informal meetings held with the COMPANY'S representative, showing the number of informal meetings, the number of values changed and the number of values unchanged.

F. CONTRACT

The Town of Gorham and the COMPANY shall enter into a formal contract, and all or some of the papers of the proposal, shall be considered as an integral and inseparable part of said contract as agreed upon by both Parties.

Any questions, comments or requests for additional information shall be addressed to:

Benjamin Thompson, Assessor
Town of Gorham
75 South Street, Suite 1
Gorham, ME 04038
Tel: (207) 222-1603

APPROACHES TO VALUE

VISION will employ a market adjusted cost approach which it has successfully utilized in over 300 communities throughout New England. It is a system that is very effective for estimating market value.

Land valuation will be accomplished through an analysis of vacant sales, as well as a land residual analysis, which is accomplished by deducting improvement values and extracting land values from improved sales. This analysis results in a base land curve. In each community, neighborhoods will be established that represent similar value patterns and neighborhood factors will be established. Each neighborhood, street by street, will also be rated for desirability which provides a second factor that may be applied to the base square foot schedule to account for differences in location. In addition, condition factors will be applied to account for negative or positive influences on value such as topography, view, irregular lot shape, waterfront and other factors.

Overall property values, including improvement value, will be verified by the sales ratio analysis, segregated by the pertinent value related factors of each property. This analysis will be stratified within various categories including style of property, segmented by size and age, by lot size and location factors. This analysis enables the Senior Appraisers to fine-tune the final tables for each property to create a mirror image of market sales activity within the Municipality.

For commercial/industrial properties, all three approaches to value will be employed. For commercial/industrial properties that are basically non-income-producing, the secondary approach will be the market approach, utilizing the square foot values derived from the sales analysis for the particular use type of the property. Square foot values will be segregated by type, including industrial, warehouse, retail, etc. and will provide reasonable ranges for per square foot sale prices of building areas. Land value, once determined, will be added to building value for an estimate of total value. For all income producing commercial property, the income approach, utilizing a direct capitalization approach, will be employed.

The replacement cost approach to value will be employed for both residential and commercial and industrial properties as follows:

Information derived from our cost analysis will provide the basis for determining the cost pricing schedules used in the valuation of residential and commercial\industrial properties.

Subsequent to the determination of replacement cost pricing schedules and the establishment of land values, VISION will analyze the sales of improved properties in order to derive an estimate of physical and functional depreciation and economic obsolescence. A report of this study of sales of improved properties will be made to the Assessors, listing the comparison subjects and detailing the schedules of adjustments to be made prior to valuation production.

Approaches to Value, *continued*

Physical and functional depreciation and economic obsolescence will be computed to be the difference between the selling price of the total property and the sum of the estimated replacement cost new of the improvement plus the estimated land value.

Provided that a sufficient number of sales are available, guidelines in the form of tables based upon the condition, desirability and usefulness of a building relative to its actual age will be developed. After approval by the Assessors, these tables will be used to estimate the depreciation of comparable subject properties.

All of these tables are then applied to each parcel in the Municipality. Each property is then reviewed in the field by an appraiser. During this review, the appraiser rechecks the physical data and then ensures that the value is consistent with the sales activity within the immediate area. This value then becomes the final proposed value and once accepted by the Municipality becomes the final assessed value.

SALES AND COST ANALYSIS

- a. The contractor will make an analysis of land sales and developed parcel sales that have occurred in at least the current and two previous years ending April 1, 2017. Sales utilized in this analysis will be summarized and bound in a loose-leaf book to be utilized as a valuation guide and a source of comparable sales for the valuation of property in the town. The binder shall include the property record card and valuation print out for the sold properties. Sales data will also be depicted on a set of tax maps for the town.
- b. Unit cost schedules will be developed based upon local construction costs. The schedules shall be suitable for the valuation of properties of the sizes and types found in the town.
- c. A building grading system and specifications of construction for various grades to be utilized in the valuation of property in this project will be developed.
- d. The land schedules developed may utilize front foot, square foot, or acreage units as appropriate for the valuation of areas and property types located in the town.
- e. An appraisal manual, including grading specifications, cost schedules, depreciation schedules, and land valuation schedules shall be developed for the project. It shall be entitled "Assessment Manual". Two copies of the appraisal manual will be delivered to the assessors' office upon completion of the project.
- f. The appraisal manual will be confirmed with a sales ratio analysis and coefficient analysis computed in a manner suggested by Maine Revenue Services. The goal is to obtain a residential sales ratio of between 95 and 100% with a coefficient of dispersion of 15 or less.

**PROPOSED SCHEDULE
TOWN OF GORHAM, MAINE
2021 REVALUATION**

<i>TASK</i>	<i>FROM</i>	<i>TO</i>
Project Startup	03/15/2020	04/01/2020
Data Collection, New Images & Data Entry	04/07/2020	03/01/2021
Land Study and Building Cost Manual	01/15/2021	05/15/2021
Market Data Study	01/15/2021	05/15/2021
Field Review	03/12/2021	06/12/2021
Commercial Study of Market Rents, Expenses & Capitalization Factors	03/15/2021	06/13/2021
Deliver Residential & Commercial Values to Assessor	06/14/2021	
Assessor review of values	06/14/2021	06/21/2021
Assessment hearing notices mailed	06/22/2021	
Informal Hearings and Hearing Changed notices mailed out	06/24/2021	07/24/2021
Finalization	07/24/2021	08/01/2021
Project Completion	08/01/2021	

This proposed schedule can be modified to accommodate the needs of the Community.

VISION GOVERNMENT SOLUTIONS INC. CORPORATE PROFILE

COMPANY

Since 1975, Vision Government Solutions, Inc. has been providing quality Appraisal Services and CAMA Software to assessing departments located throughout the United States. During this time, our company has grown to be the largest New England based provider of revaluation services and software and we now enjoy a reputation that is unmatched in our industry. Our appraisal staff is comprised of professionals that have significant industry experience. Our Senior Appraisal personnel average over 20 years of experience, yet all remain committed to continuing their appraisal education and adopting new and innovative appraisal techniques. We complement our strong employee experience by providing technologically advanced CAMA software and we support this software with a well-staffed and fully trained group of programmers, help desk specialists and appraisal experts. Our software is currently installed in over 450 assessing jurisdictions located throughout the United States and the District of Columbia with installations that range from 500 parcels to more than 1,000,000.

INNOVATION

Vision has observed our customer's changing needs and we have re-engineered our business practices and our software technology in order to meet these new requirements. Our company culture fosters innovation at all levels. Our current staff includes a diverse group of appraisal and information systems personnel dedicated to maximizing productivity through the use of technology. Our technology can support any size assessing department using smart client technology on a web centric architecture.

COMMITMENT

Our Corporate goal continues to be the refinement of the assessment administration process through the use of new technology and innovative management techniques. We have been successful in the past and we will continue to spend the necessary resources on research and development in the information systems field, as well as for the education of our employees to maintain our leadership role in the Appraisal and Assessing field throughout the United States.

SERVICES

At Vision, we combine the talents of experienced revaluation professionals, technical programmers and data conversion specialists on all new software implementations. By having our appraisal and technical people work with your staff, your decision makers gain a better understanding of the project and can make more informed decisions resulting in a higher level of satisfaction. Should your jurisdiction require assistance beyond the usual staff training, our appraisers can do anything from technical training, modeling training to completing a full revaluation. If you are looking to manage risk when switching CAMA software, Vision can supply the people that can speak to both the appraisers and the technical personnel.

Advantages and Benefits of Vision Government Solutions

It is our perspective that there is no firm better suited for the delivery of accurate and equitable values, positive taxpayer relations, and service level efficiency and quality than Vision. Here are three specific reasons why:

1. **Experience and Reputation:** There is no firm with more New England revaluation experience than Vision, with more than 200 projects completed in the past 5 years.

So many communities choose Vision because of our service quality, robust training programs, appraisal expertise, and Public Relations campaigns. The best evidence of that is the simple fact that more than 50 percent of our clients have been with Vision for more than 20 years. Firms with less diverse experience introduce the risk of inaccurate values, project timeline delays, and significant database errors that are costly to fix.

2. **Staffing and Reliability:** Unlike smaller firms with only a few staff members, Vision maintains 60 full-time appraisers on staff all the time. The best proof of our staff quality is in our retention rates, with 50% of our team having more than 20 years of experience at Vision. Specifically, we are proposing Steve Whalen as your Project Manager. Steve has extensive experience, over 30 years over revaluation experience.

3. **The Value of Integration with the Gorham CAMA Software:**

Vision's Appraisal Teams exclusively use our *Appraisal Vision*® CAMA software to conduct every revaluation. **There is no other vendor that has the level of experience on *Appraisal Vision*® version 6.5 and 8, then the Vision appraisal team.** This is critical to the success of the project, as incorrect data entry changes to the CAMA database, inconsistent tables and mass updates can lead to massive data quality errors, causing project timeline delay, costly re-work, and significant public relations issues. In fact, there are many recent examples of communities using untrained mass appraisal vendors, who have incurred additional cost fixing data quality errors on the back-end of the project. At Vision, we put in place quality control procedures to eliminate these costly errors.

Because our appraisal staff are highly trained in using *Appraisal Vision*, we expect to be able to complete the project dramatically faster and more effectively than any other option.

Not only does that mean that Gorham is receiving the very best staff in the industry to ensure truly equitable and accurate valuations for the taxpayer community, but it also provides full staffing coverage to complete the project on time, no matter what. Smaller teams introduce significant risk to project timeliness and completion.

VISION CURRENT COMMITTED LIST

<u>TOWN</u>	<u>PROJECT TYPE</u>	<u>FISCAL YEAR</u>
Bloomfield, CT	Partial Reval	2019
Branford, CT	Reval	2019
Brooklyn, CT	Partial Reval	2020
Canterbury, CT	Partial Reval	2020
Clinton, CT	Reval	2020
Colebrook, CT	Reval	2020
Coventry, CT	Update	2019
Deep River, CT	Reval	2020
East Hampton, CT	Reval	2020
Ledyard, CT	Update	2020
Madison, CT	Reval	2019
Mansfield, CT	Reval	2019
Marlborough, CT	Update	2020
Monroe, CT	Reval	2019
New Fairfield, CT	Reval	2019
New Milford, CT	Reval	2020
Old Lyme, CT	Update	2019
Pomfret, CT	Partial Reval	2020
Seymour, CT	Partial Reval	2020
Somers, CT	Update	2020
Southington, CT	Update	2020
Stafford, CT	Partial Reval	2020
Wallingford, CT	Reval	2020
West Haven, CT	Reval	2020
Westport, CT	Reval	2019
Lexington, MA	Update	2020
Berlin, MA	Reval	2021
Sutton, MA	Update	2020
Falmouth, ME	Reval	2021
Fryeburg, ME	Reval	2020
Orono, ME	Partial Reval	2020
Claremont, NH	Update	2019
Charlestown, RI	Update	2019
Cranston, RI	Update	2020
East Providence, RI	Update	2019

Hopkinton, RI	Update	2019
Portsmouth, RI	Update	2019
Richmond, RI	Reval	2019

Revised 1/7/2020

COMPLETED REVALUATION/UPDATES

MASSACHUSETTS

Abington
Acton
Alford
Amesbury
Amherst
Aquinnah
Ashburnham
Athol
Attleboro
Auburn
Avon
Barnstable
Barre
Berkley
Berlin
Blackstone
Blandford
Boxford
Bridgewater
Chelmsford
Chelsea
Clinton
Concord
Dedham
Dighton
Dracut
Dudley
Eastham
Easthampton
Easton
Edgartown
Essex
Foxborough
Gardner
Georgetown
Gloucester
Goshen
Gosnold
Groton
Hadley
Hanover
Harvard
Hingham
Holden
Holland
Hubbardston
Kingston
Lakeville
Leominster
Lexington
Longmeadow
Lowell
Mansfield
Marion
Marlborough

Marshfield
Mashpee
Mattapoissett
Medford
Middleborough
Millbury
Nantucket
Newbury
Newburyport
Norfolk
North Attleborough
North Reading
Northbridge
Norwell
Norwood
Oak Bluffs
Oakham
Otis
Orange
Oxford
Paxton
Pelham
Petersham
Phillipston
Plympton
Quincy
Randolph
Rehoboth
Revere
Rockport
Rowley
Rutland
Sharon
Shutesbury
Somerville
Southbridge
South Hadley
Southwick
Spencer
Sterling
Stockbridge
Sturbridge
Sutton
Swansea
Taunton
Templeton
Tewksbury
Tisbury
Topsfield
Walpole
Wareham
Wayland
West Boylston
West Springfield
West Tisbury
Westminster

Weston
Westwood
Wilbraham
Wilmington
Woburn
Yarmouth

MAINE

Arundel
Augusta
Bar Harbor
Bath
Berwick
Biddeford
Boothbay
Brewer
Camden
Cornish
Cumberland
Eliot
Ellsworth
Freeport
Gardiner
Harpwell
Kennebunk
Kennebunkport
Kittery
Monmouth
Mount Desert
North Yarmouth
Ogunquit
Old Orchard Beach
Raymond
Rockland
Rockport
Sabattus
Sanford
Scarborough
Skowhegan
South Portland
South Thomaston
Standish
Topsham
Waterville
Wells
West Bath
Westbrook
Winslow
Winthrop
York

VERMONT

Bridgewater
Castleton
Colchester
Hartford
Newport
Williston

NEW HAMPSHIRE

Acworth
Amherst
Ashland
Bedford
Belmont
Bethlehem
Bow
Candia
Charlestown
Chester
Chesterfield
Claremont
Concord
Deerfield
Derry
Dover
Dunbarton
Durham
Epping
Exeter
Fitzwilliam
Fremont
Goffstown
Gorham
Greenland
Hampton
Hampton Falls
Henniker
Hinsdale
Hollis
Hooksett
Jaffrey
Kingston
Laconia
Lebanon
Lincoln
Littleton
Lyme
Lyndeborough
Manchester
Meredith
Milford
Moultonborough
Nashua
Newbury
New Durham

New London
New Market
Northampton
Ossipee
Pelham
Pembroke
Portsmouth
Raymond
Rindge
Rye
Salem
Sanbornton
Sandown
Seabrook
Strafford
Sunapee
Swanzy
Tilton
Troy
Warner
Wilton
Wolfeboro

CONNECTICUT

Ansonia
Andover
Ashford
Barkhamsted
Berlin
Bethlehem
Bolton
Branford
Bridgeport
Bridgewater
Bristol
Brookfield
Brooklyn
Burlington
Canaan
Canterbury
Chaplin
Chester
Clinton
Colchester
Colebrook
Columbia
Coventry
Cromwell
Danbury
Deep River
Eastford
East Granby
East Haddam
East Lyme

Ellington
Enfield
Essex
Fairfield
Franklin
Glastonbury
Goshen
Granby
Griswold
Groton
Haddem
Hamden
Hampton
Harwington
Kent
Lebanon
Ledyard
Litchfield
Lyme
Madison
Manchester
Mansfield
Marlborough
Middlefield
Middlebury
Milford
Montville
Naugatuck
NECCOG
New Britain
New Canaan
New Fairfield
New Hartford
New Haven
New London
New Milford
Norfolk
North Branford
North Stonington
Norwich
Old Lyme
Old Saybrook
Orange
Oxford
Plainfield
Pomfret
Putnam
Preston
Redding
Roxbury
Salem
Scotland
Seymour
Sharon
Somers

Southbury
Southington
South Windsor
Sprague
Stafford
Stamford
Stonington
Strafford
Stratford
Suffield
Thompson
Tolland
Torrington
Trumbull
Union
Voluntown
Wallingford
Warren
Waterford
Watertown
West Haven
Westbrook
Weston
Westport
Wethersfield
Willington
Wilton
Winchester
Windham
Windsor
Windsor Locks
Wolcott
Woodbridge
Woodstock

Pawtucket
Portsmouth
Providence
Richmond
Smithfield
South Kingstown
Tiverton
Warwick
Westerly
Woonsocket

RHODE ISLAND

Barrington
Burrville
Central Falls
Charlestown
Cranston
East Providence
Exeter
Foster
Jamestown
Johnston
Lincoln
Little Compton
Middletown
Narragansett
Newport
New Shoreham
North Kingstown
North Smithfield
North Providence

INSTALLED CAMA CLIENT LIST

Andover	CT	John	Chaponis	860-742-7305 Ext.5
Ansonia	CT	Marsha	Benno	203-736-5950
Ashford	CT	Kara	Fishman	860-487-4403
Barkhamsted	CT	Francine	Beland	860-379-3600
Berlin	CT	Joe	Ferraro	860-828-7167
Bethlehem	CT	Carolyn	Nadeau	203-266-7510 x3
Bloomfield	CT	Todd	Helems	860-769-3532
Bolton	CT	Helen	Totz	(860) 649-8066 x 6100
Branford	CT	Barbara	Neal	203-488-2039
Bridgeport	CT	Dan	Kenny	203-394-6968
Bridgewater	CT	Denise	Pinter	860-355-9379
Bristol	CT	Tom	DeNoto	860-584-6245
Brookfield	CT	Tammie	Fiske	203-775-7302
Brooklyn	CT	Kathleen	Thornton	860-774-5611 x20
Burlington	CT	Beth	Paul	860-673-3901 x3
Canaan	CT	Hazel	McGuire	860-824-0707x14
Canterbury	CT	Lynn	Byberg	860-546-6035
Chaplin	CT	Chandler	Rose	860- 455-0073 EXT 314
Clinton	CT	Donna	Sempey	860-664-1119 direct 860-669-9269
Colchester	CT	John	Chaponis	860-537-7205
Colebrook	CT	Michele	Sloane	860-379-3738 ext 206
Columbia	CT	Mary	Lavallee	860-228-9555 press #6
Cornwall	CT	Barbara	Bigos	860-672-2703
Coventry	CT	Mike	D'Amicol	(860)742-4067
Danbury	CT	Brian	Lastra	203-797-4556
Deep River	CT	Robin	O'Loughlin	860-526-6029 ext. 232
East Granby	CT	Mary Ellen	Brown	860-653-2852
East Haddam	CT	Loreta	Zdanys, CCMail	860-873-5026
East Hampton	CT	Gail	Pititto	860-267-2510
East Hartford	CT	Brian	Smith	860-291-7268
East Lyme (Niantic)	CT	Diane	Vitagliano	860-739-6931 x1107
Eastford	CT	Mary	Lavallee	860-974-1291 x 7
Ellington	CT	Kim	Bechard	860-870-3109
Enfield	CT	Della	Froment	860-253-6338
Essex	CT	Jessica	Sypher	860-767-4340 x 124
Fairfield	CT	Ross	Murray	203-256-3110
Glastonbury	CT	Nicole	Lintereur	860-652-7604
Goshen	CT	Lucy	Hussman	860-491-2115 x230
Granby	CT	Sue	Altieri	860-844-5312
Griswold	CT	Evelyn	Spagnolo	860-376-7060 x 105
Haddam	CT	Tammy	Anderson	860-345-8531 x226
Hamden	CT	John	Gelati	203-287-7128

Hampton	CT	Kathy	Thornton	860-455-9132 x 5
Harwinton	CT	Michele	DeSilva	860-485-0898
Kent	CT	Patricia	Braislin	860-927-3160
Lebanon	CT	Emma	Sousa	860-642-6141
Ledyard	CT	Adrianna	Hedwall	860-464-3237
Lisbon	CT	Angel	Johnston	860-376-5115
Litchfield	CT	Kathy	Brown	860-567-7559
Lyme	CT	Deborah	Yeomans	860-434-8092
Madison	CT	Orietta	Nucolo	203-245-5651
Manchester	CT	John	Rainaldi	860-647-3011
Mansfield	CT	Irene	Luciano	860-429-3311
Marlborough	CT	Marie	Hall	860-295-6201 x 213
Mashantucket Pequot	CT	Frank	Fiori	860-396-2079
Middlebury	CT	Chris	Kelsey	203-758-1447
Middlefield	CT	Janet	Baron	860-349-7111 x16
Middletown	CT	Damon	Braasch	(860) 638-4930 ext. 0
Milford	CT	Dan	Thomas	203-783-3215
Monroe	CT	Justin	Feldman	203-452-2800 x1010
Morris	CT	Betsy	Quist	860-567-6096
Naugatuck	CT	Carol Ann	Tyler	203-720-7016
New Britain	CT	Michael	Konik	860-826-3326
New Canaan	CT	Sebastian	Caldarella	203-594-3005
New Fairfield	CT	Rich	Seman	203-312-5625
New Hartford	CT	Cory	Iacino	860-379-5235
New Haven	CT	Alex	Pullen	(203) 946-8061
New London	CT	Paige	Walton	860-437-6317
New Milford	CT	Kathy	Conway	860-355-6070
Newtown	CT	Penny	Mudgett	203-270-4242
Norfolk	CT	Michele	Sloane	860 542-5287
North Branford	CT	David	Ambrose	203-484-6013
North Stonington	CT	Darryl	Del Grosso	860-535-2877 x 23
Norwalk	CT	Michael	Stewart	203-854-7941
Norwich	CT	Donna	Ralston	(860) 823-3722
Old Lyme	CT	Melinda	Kronfeld	860-434-1605 x 218
Old Saybrook	CT	Norm	Wood	860-395-3137
Orange	CT	Mark	Branchesi	203-891-4700 x4722
Oxford	CT	Eva	Lintzner	203-888-2543 ext 3055
Plainfield	CT	Mary Ellen	Hall	860-230-3008
Pomfret	CT	Kathleen	Thornton	
Preston	CT	Mildred	Peringer	860-889-2529 x 115
Putnam	CT	Angela	Sanchez	860-963-6802
Redding	CT	John	Ford	203-938-5001
Salem	CT	Barbara	Perry	860-859-3873 x 130
Salisbury	CT	Kayla	Johnson	860-435-5176
Scotland	CT	Kara	Fishman	860-456-7797x104
Seymour	CT	Joseph	Kusiak	203-881-5013

Sharon	CT	Patricia	Braislin	860-364-0205
Somers	CT	Walter	Topliff	860-763-8203
South Windsor	CT	Mary	Huda	860-644-2511 ext 213
Southbury	CT	Michael	Moriarty	203-262-0674
Southington	CT	Teresa	Babon	860-276-6205
Sprague	CT	Lynn	Byberg	860-822-3002
Stafford	CT	Tami	Rossi	860-684-1786
Stamford	CT	Greg	Stackpole	203-977-4018
Stonington	CT	Marsha	Standish	860-535-5005
Stratford	CT	Melinda	Fonda	203-385-4025
Suffield	CT	Dan	Beaudoin	860-668-3843
Thompson	CT	Diana	Couture	860-923-2259
Tolland	CT	Jason	Lawrence	860-871-3655
Trumbull	CT	Mark	Devestern	203-452-5015
Union	CT	Mary	Huda	860-684-5705
Voluntown	CT	Beth	Taylor	
Wallingford	CT	Shelby	Jackson, III	203-294-2001
Waterford	CT	Terence	Dinnean	860-444-5820
West Hartford	CT	Joe	Dakers	860-561-7416
West Haven	CT	Ann Marie	Gradoia	203-937-3513 ext. 1
Westbrook	CT	Pam	Fogarty	860-399-3016 Ext. 122
Westport	CT	Paul	Friia	203-341-1135
Willington	CT	Rachel	Pierce	
Wilton	CT	Sarah	Scacco	203-563-0121
Winchester	CT	Rhonda	Roy	860-379-5461
Windham	CT	Chandler	Rose	860-465-3026
Windsor	CT	Lawrence	LaBarbera	860-285-1819
Wolcott	CT	Pamela	Deziel	203-879-8100 EXT 111
Woodbridge	CT	Betsy	Quist	203-389-3417
Woodstock	CT	Richard	Kryzak	860-928-6929 x326
Washington	DC	William	Nelson	202-442-6784
Pasco County	FL	Mike	Wells	352-521-4433
Putnam County	FL	Tim	Parker	386-329-0300
Sumter County	FL	Shauna	Jordan	352-569-6791
Taylor County	FL	Bruce	Ratliff	850-838-3511
Abington	MA	Jack	Pistorino	781-982-2107
Acton	MA	Brian	McMullen	978-264-9622
Amesbury	MA	Jason	DiScipio	978-388-8102
Amherst	MA	David	Burgess	413-259-3024
Aquinnah	MA	Angela	Cywinski	508-645-2306
Ashburnham	MA	Board of	Assessors	978-827-4100
Athol	MA	Lisa	Aldrich	978-249-3880
Attleboro	MA	Stan	Nacewicz	508-223-2222 x3135
Auburn	MA	Cindy	Cosgrove	508-832-7740 ext 1234
Avon	MA	Paul	Sullivan	508-588-0414 x1027
Barnstable	MA	Edward	O'Neil	508-862-4020

Barre	MA	Michael	Landry	978-355-2504 X3 OR X104
Berlin	MA	Molly	Reed	978-838-2256
Blackstone	MA	Patricia	Salamone	508-883-1500 x 121
Boxford	MA	Kristin	Hanlon	(978) 887-6000 ext. 142
Boylston	MA	Margo	Richardson	508-869-6543
Cambridge	MA	Robert	Reardon	617 349 4343
Chelmsford	MA	Frank	Reen	978-244-3317
Chelsea	MA	Mary-Lou	Ireland	617-466-4014
Chicopee	MA	Laura	McCarthy	413-594-1430
Clinton	MA	David	Baird	978-365-4117
Concord	MA	Lane	Partridge	978-318-3075
Dartmouth	MA	Richard	Gonsalves	508-910-1809
Dedham	MA	Richard	Henderson	781-751-9130
Dracut	MA	Karen	Golden	978 453 2451
Dudley	MA	Lisa	Berg	508-949-8006
Duxbury	MA	Steve	Dunn	781-934-1100 ext 5430
East Longmeadow	MA	Diane	Bishop MAA	413-525-5400 ext1601
Easthampton	MA	Lori	Stewart	413-529-1401
Easton	MA	Robbie	Alford	508-230-0520
Edgartown	MA	Jo Ann	Resendes	508-627-6141
Essex	MA	Gillian	Palumbo	978-768-7831
Foxborough	MA	Hannelore	Simonds	508-543-1215
Gardner	MA	Sue	Byrne	978-630-4004
Georgetown	MA	Thomas	Berube	978-337-0492
Gloucester	MA	Nancy	Papows	978-281-9715
Gosnold	MA	Pat	Decosta	508-990-7408
Granby	MA	Keri-Ann	Wenzel	413-467-7196
Groton	MA	Jonathan	Greeno	978-448-1127
Hadley	MA	Dan	Zdonek	413-586-6320
Hamilton	MA	Tina	Zelano	978-468-5574
Hampden	MA	Carolyn	Reed	413-566-2151 ext.106
Hanover	MA	Elaine	Boidi	781-826-6401
Harvard	MA	Rebecca	Boucher	978-456-4100 ext 315
Hatfield	MA	David	Zagorski	413-247-0322
Hingham	MA	Rick	Nowlan	781-741-1455
Holden	MA	Rosemary	Scully	508-210-5516
Holland	MA	JoAnne	Higgins	413-245-7108 x 106
Hubbardston	MA	Genevieve	Daniels	978-928-1400 x203
Hudson	MA	JoAnne	McIntyre	978-568-9620
Kingston	MA	Meredith	Rafiki	781-585-0509
Lakeville	MA	Norman	Taylor	
Lawrence	MA	Alex	Vega	978-620-3192
Leominster	MA	William	Mitchell	978-534-7531 x 272
Lexington	MA	Rob	Lent	781-862-0500 x 84578
Longmeadow	MA	Jessica	Guerra	413-565-4115
Lowell	MA	Sue	Lemay	978-970-4212

Mansfield	MA	Nancy	Hinote	508-261-7350
Marion	MA	Linda	Dessert	508-748-3518
Marlborough	MA	Paula	Murphy	508-460-3779
Mattapoissett	MA	Kathy	Costello	508-758-4106 x3
Medford	MA	Ellen	Brideau	781-393-2435
Middleborough	MA	Barbara	Erickson	508-946-2410/2411ext 110
Millbury	MA	Jean	Moroski	508-865-4732
Millis	MA	Paula	Dumont	508-376-7049 ext.115
Monson	MA	Maryann	Wilkinson	413 267 4120
Nantucket	MA	Deb	Dilworth	508-228-7200 ext 7035
New Salem	MA	Wayne	Hachey	978-544-2731
Newburyport	MA	Jill	Brennan	978-465-4403
Newton	MA	Elizabeth	Dromey	617-796-1160
Norfolk	MA	John	Curran	508-528-1120
North Attleborough	MA	Sheila	Scaduto	508-699-0117
Northbridge	MA	Robert	Fitzgerald	508-234-2740
Norwell	MA	Barbara	Gingras	781-659-8014
Norwood	MA	Timothy	McDonough	781-762-1240 x141
Oak Bluffs	MA	David	Bailey	508-693-3554 x104
Oakham	MA	Priscilla	Johnson	508-882-5549 x 302
Otis	MA	Lyn	Minery	413-269-0100
Palmer	MA	Rob	Leroux	413-283-2607
Paxton	MA	Kathleen	Stanley	508-799-7231 x 16
Pelham	MA	Martha	Leamy	413-253-0734
Petersham	MA	Kelly	Garlock	978-724-6658
Phillipston	MA	Sue	Byrne	978-249-1732
Plainville	MA	Maureen	Clarke	508-695-3010 x 14
Plympton	MA	Deb	Stuart	781-585-3227
Princeton	MA	Kathy	stanley	978-464-2104
Quincy	MA	Colleen	Healy	617-376-1172
Randolph	MA	Bob	Cole	781-961-0907
Rehoboth	MA	Linda	Greaves	508-252-3352
Rochester	MA	Board of Assessors		508-763-5250
Rockport	MA	Diane	Lashua	978-546-2011
Rowley	MA	Sean	McFadden	978-948-2021
Russell	MA	Ted	Gloss	413-862-6214
Rutland	MA	Diane	Peterson	508-886-4101
Sharon	MA	Mark	Mazur	781-784-1500 x1150
Shrewsbury	MA	Chris	Reidy	508-841-8353
Shutesbury	MA	Ken	Holmberg	413-259-3790
Somerville	MA	Francis	Golden	617-625-6600 x 3110
South Hadley	MA	Melissa	Couture	413-538-5027 x105
Southampton	MA	Martha	Leamy	413-527-4741
Southbridge	MA	Wilfrid	Cournoyer	508-764-5404
Southwick	MA	Sue	Gore	413-569-0565
Spencer	MA	Linda	LeBlanc	508-885-7500 x 121

Sterling	MA	Harald	Scheid	978-422-8113
Stockbridge	MA	Mike	Blay	413-298-4174 x 107
Sturbridge	MA	Ann	Murphy	508-347-2503
Sutton	MA	Joyce	Sardagnola	508-865-8722
Swansea	MA	Thomas	Welch	508-324-6703
Taunton	MA	Lisa	Labelle	508-821-1011
Templeton	MA	Luanne	Royer	978-894-2760
Tewksbury	MA	Joanne	Foley	978-640-4330
Tisbury	MA	Ann Marie	Cywinski	508-696-4207
Wales	MA	Dick	Verville	413-245-3260 x 103
Walpole	MA	Dennis	Flis	508-660-7314
Wareham	MA	Jacqui	Nichols	508-291-3100 ext 3169
Wayland	MA	Bruce	Morgan	508-358-3658
Wenham	MA	Shirley	Cashman	978-468-5520 x5
West Boylston	MA	Myra	Fortugo	774-261-4040
West Brookfield	MA	Elisabeth	DiMaio	508-867-1421áááá x303
West Springfield	MA	Michael	Motta	413-263-3050
Westfield	MA	Robin	Johnson	413-572-6203
Westminster	MA	Robin	Holm	978-874-7401
Weston	MA	Eric	Josephson	781-786-5055
Westwood	MA	Debbie	Robbins	781-320-1003
Wilbraham	MA	Manny	Silva	413-596-2817 x7
Wilmington	MA	Karen	Rassias	978-658-3675
Winthrop	MA	Stephen	Roche	617-846-2716 x1055
Woburn	MA	Andrew	Creen	781-897-5830
Worcester	MA	William	Ford	508-799-1098
Wrentham	MA	Sandy	Genna	508-384-5408
Yarmouth	MA	Andy	Machado	508-398-2231 x1225
Arundel	ME	Beth	Newcombe	207-985-4201
Augusta	ME	Lisa	Morin	207-626-2320
Bar Harbor	ME	Justin	VanDongen	207-288-3320
Bath	ME	Brenda	Cummings	207-443-8336
Berwick	ME	Paul	McKenney	603-534-2118
Biddeford	ME	Frank	Yattaw	207-284-9003 Ext.4127
Boothbay Harbor	ME	Robert	Duplisea	207-633-3671
Brewer	ME	Mary	Stuart	
Brunswick	ME	Cathleen	Jamison	207-725-6650
Camden	ME	Kerry	Leichtman	207-236-3353 press 6
Casco	ME	David	Morton	207-627-4515 ext. 201
Cornish	ME	Katherine	Blake	207-625-4324
Cumberland	ME	John	Brushwein	207-829-2204
Eliot	ME	Martine	Painchaud	207-439-1813 x 111
Ellsworth	ME	Larry	Gardner, CMA	207-667-8674
Falmouth	ME	Jennifer	Phinney	207-699-5219
Freeport	ME	Robert	Konczal	207-865-4743 x 140
Gardiner	ME	Curt	Lebel	207-582-6892 ext.1107

Gorham	ME	Mike	D'Arcangelo	207-222-1600 x1601
Harpswell	ME	Debbie	Turner	207-833-5771 x114
Kennebunk	ME	Daniel	Robinson	207-985-2102 x1310
Kennebunkport	ME	Werner	Gilliam	207-967-0402 x102
Kittery	ME	Paul	McKenney	207-439-0452 x306
Monmouth	ME	Laurie	Walker	207-933-2206 (2)
Mount Desert	ME	Kyle	Avila	207-276-5531 ext.1
North Yarmouth	ME	Robert	Konczal	207-829-3705
Ogunquit	ME	Barbara	Kinsman	207-646-5140 opt 8 then 2
Old Orchard Beach	ME	Bill	DiDonato	207-934-5714 x1512
Raymond	ME	Kaela	Gonzalez	207-655-4742 x133
Richmond	ME	Laurisa	Loon	207-737-4305 x208
Rockland	ME	Dennis	Reed	
Rockport	ME	Kerry	Leichtman	207-236-6758
Sabattus	ME	Donna	Hayes	207-375-4331
Saco	ME	Kate	Kern	207-282-1611
Sanford	ME	George	Greene	
Scarborough	ME	David	Bouffard	207-730-4061
Skowhegan	ME	Leisa	Emery (Porter)	207-474-6903 ext. 119
South Portland	ME	Jim	Thomas	207-767-7604
South Thomaston	ME	Kevin	McCormick	207-596-6584
Standish	ME	Joseph	Merry	207-642-4572
Topsham	ME	Justin	Hennessy	207-725-1722
Waterville	ME	Paul	Castonguay	207-680-4200 x4220
Wells	ME	Keeley-Anne	Lambert	207-646-6081
West Bath	ME	Robert	Morris	207-443-4342
Westbrook	ME	Jim	Thomas	207-854-0638 x 3
Windham	ME	Elisa	Trepanier	207-894-5900 ext.6512
Winslow	ME	Judy	Mathiau	207-872-2776 ext. 5205
Winthrop	ME	Linda	Huff	207-377-7206
Yarmouth	ME	Dawn	Madden	207-846-9036
York	ME	Rick	Mace	207-363-1005 x1
Bloomington	MN	Matthew	Gersemehl, SAMA	952-563-8708
Chisago County	MN	John	Keefe, SAMA	651-213-0400
Scott County	MN	Michael	Thompson	952- 496-8972
Acworth	NH	Kathi	Bradt	603-835-6879
Amherst	NH	Michele	Crowley	603-673-6041 x202
Bedford	NH	Bill	Ingalls	603-792-1316
Belmont	NH	Jeanne	Beaudin	603-267-8300 x124
Berlin	NH	Brian	Chevarie	603-752-5245
Bethlehem	NH	Claudia	Brown	603-869-3351
Bow	NH	Monica	Hurley	603-228-1187 x 115
Bridgewater	NH	Terry	Murphy	603-744-5055
Candia	NH	Andrea	Hansen	603-483-8101
Charlestown	NH	Diane	Town	603-826-4400

Chesterfield	NH	Board of	Selectmen	603-363-4624
Claremont	NH	Marlene	Jordan	603-542-7004 x2
Concord	NH	Kathy	Temchack	603-225-8550
Derry	NH	Mark	Jesionowski	603-432-6104 xt5499
Dunbarton	NH	Line	Comeau	603-774-3541 x 102
Durham	NH	Jim	Rice	603-868-8064
Enfield	NH	Julie	Huntley	603-632-5026
Epping	NH	Joyce	Blanchard	603-679-5441 ex 20
Exeter	NH	Janet	Whitten	603-778-0591 ext 110
Fremont	NH	Heidi	Carlson	603-895-9035 x10
Goffstown	NH	Scott	Bartlett	603-497-8990 x113
Grantham	NH	Melissa	White	603-863-6021 x 301
Greenland	NH	Karen	Anderson	603-431-7111 x100
Hampton	NH	Ed	Tinker	603-929-5914
Hampton Falls	NH	Todd	Haywood	603-926-4618
Henniker	NH	Helga	Winn	603 428 3221 x2
Hinsdale	NH	Kathryn	Lynch	603-336-5727 x 17
Hollis	NH	Connie	Cain	603-465-2209 x105
Hooksett	NH	Leeann	Moynihan	603-268-0003
Jaffrey	NH	Erlene	Lemire	603-532-7445 x102
Keene	NH	Dan	Langille	603-352-2125
Laconia	NH	Deb	Deriick	603-527-1268
Lincoln	NH	Helen	Jones	603-745-2757 x3
Littleton	NH	Amy	Hatfield	603-444-3996 ext 12
Lyme	NH	Diana	Calder	603-795-4639
Lyndeborough	NH	Dawn	Griska	603-654-5955 ext.221
Manchester	NH	Bob	Gagne	603-624-6520 x6795
Meredith	NH	Jim	Commerford	603-677-4226
Milford	NH	Marti	Noel	603-249-0615 x240
Moultonborough	NH	Josephine	Belville	603-476-2347
New Durham	NH	Scott	Kinmond	603-859-2091
Newington	NH	Susan	Henderson	603-436-7640
Newmarket	NH	Scott	Marsh	603-659-3073 Ext.1313
North Hampton	NH	Mike	Pelletier	603-964-8087
Pelham	NH	Susan	Snide	603-508-3080
Pembroke	NH	Elaine	Wesson	603-485-4747 x 213
Portsmouth	NH	Rosann	Maurice-Lentz	603-610-7212
Raymond	NH	Donna	Giberson	603-895-4735 x102
Rindge	NH	David	DuVernay	603-899-5181 x113
Rye	NH	David	Hynes	603-964-5523
Salem	NH	Normand	Pelletier	603-890-2018
Sandown	NH	Lynn	Blaisdell	603-887-8392
Seabrook	NH	Angela	Silva	603-474-2966
Strafford	NH	Liz	Evans	603-664-2192 ext 105
Swanzey	NH	Michael	Branley	603-352-7411 x107
Tamworth	NH	Darlene	McWhirter	603-323-7525 x14

Troy	NH	Alissa	Fox	603-242-7722
Wilton	NH	Pam	Atwood	603-654-9451 2 THEN x1
Windham	NH	Jennifer	Zins	x3006
Carmel	NY	Glenn	Droese (DROSEY)	(845) 628-1500
New York City	NY	Lance	Abrams	212-361-7014
Rye	NY	Denise	Knauer	914-939-3566 x1
Bradford County	PA	Donna	Roof	570-265-1714 x2827
Crawford County	PA	Joe	Galbo	814-333-7305
Greene County	PA	Mary Ann (Lou)	Lewis	724-852-5241
Tioga County	PA	Deborah	Crawford, CPE	(570) 723-8112á
Warren County	PA	Karen	Beardsley, CPE	(814) 728-3424á
Barrington	RI	Mike	Minardi	401-247-1900 x322
Burrillville	RI	Jennifer	Mooney	401-568-4300 ext 126
Charlestown	RI	Ken	Swain	401-364-1233
Cranston	RI	Mark	Capuano	401-780-3188
Cumberland	RI	Ken	Mallette	401 728-2400 x149
East Providence	RI	Steve	Hazard	401-435-7574
Exeter	RI	Kerri	Petrarca	401- 294-5734á
Foster	RI	Patricia	Moreau	401-392-9202
Glocester	RI	Lori	DiSantis	401-568-6206 x3
Hopkinton	RI	Liz	Monty	401-377-7780
Jamestown	RI	Christine	Brochu	401-423-9802
Johnston	RI	Kim	Gallonio	401-553-8824
Lincoln	RI	Elaine	Mondillo	401-333-1100 x8448
Little Compton	RI	Denise	Cosgrove	401-635-4509
Middletown	RI	George	Durgin	401-847-7300
New Shoreham	RI	Joan	Wholey	401-466-3217
Newport	RI	Jade	Phillips	401-845-5364
North Kingstown	RI	Linda	Cwiek	401-294-3331 x 110
Pawtucket	RI	Robert	Burns	401-728-0500 x218
Portsmouth	RI	Matt	Helfand	401-683-1536
Providence	RI	Thaddeus	Jankowski, Jr.	
Richmond	RI	Elizabeth	Fournier	401-539-9000 x 7
Smithfield	RI	Drew	Manlove	401-233-1015
South Kingstown	RI	Jean-Paul	Bouchard	401-789-9331 x1222
Tiverton	RI	David	Robert	401-816-0255
Warwick	RI	Neal	Dupuis	401-738-2000 x4
Westerly	RI	Dave	Thompson	401-348-2544
Albemarle County	VA	Peter	Lynch	434 296 5856
Charlottesville City	VA	Jeffrey	Davis	(434) 970-3136á
Chesapeake City	VA	William	Rice	757-382-6235
Culpeper County	VA	W.	Kilby	540-727-3411
Gloucester County	VA	Derek	Green	804-693-1323
Halifax County	VA	Brenda	Powell	434-476-3185
Hanover County	VA	Richard	Paul	804-365-6027
Harrisonburg City	VA	Lisa	Neunlist	540-432-7795

Henrico County	VA	Tom	Little	804 501-5346
Henry County	VA	Linda	Love	276-634-4611
Manassas City	VA	Terri	Martin	703-257-8298
Martinsville City	VA	Ruth	Easley	276-403-5130
New Kent County	VA	Laura	Ecimovic	804-966-9610
Northampton County	VA	Charlene	Gray	757-678-0440 ex 506
Poquoson City	VA	Richard	Faison	757-868-3080
Portsmouth City	VA	Janey	Culpepper	757-393-8631 x2163
Prince George County	VA	Rod	Compton	804-722-8629
Salem City	VA	Justin	Kuzmich	540-378-0175
Staunton City	VA	Charley	Haney	540-332-3827
Suffolk City	VA	Jean	Jackson	757-514-7479
York County	VA	Maria	Kattman	757-890-3720
Williamsburg City	VA	Derek	Green	757-220-6185
Bridgewater	VT	Board of Listers		802-672-3334
Colchester	VT	Robert	Vickery	802-264-5671
Hartford	VT	Michelle	Wilson	802-478-1109
Newport	VT	Spencer	Potter	802-334-6992
Pittsford	VT	John	Eugair	802-483-6500 ext 15
Stratton	VT	Kent	Young	802-896-6184
West Rutland	VT	Lisa	Wright	802-438-2263
Waukesha City	WI	Paul	Klauck	262-524-3510

Revised 4-2-2019

Vision Government Solutions Public Relations Program

Over recent years, Vision Government Solutions has witnessed an increased need for a comprehensive Public Relations Program. As federal and state governments cut back on all programs, Municipal Governments struggle to maintain basic services and real estate taxes are scrutinized.

As all assessing professionals know, revaluations and updates are a means of equalizing the tax base by bringing all property to a uniform percentage of current value. To property owners, the word "revaluation" has become synonymous with "tax increase." When a revaluation is announced, the taxpayers are anxious and wary. A solid Public Relations Program educates and informs property owners about a revaluation, how it's implemented and how their property taxes fit into the equation. With educated, informed and active taxpayers, a Public Relations Program is required to create a positive image of the tax assessing process.

Vision Government Solutions Public Relations Program begins when a project is awarded. The Vision Government Solutions Project Manager and the Sales Staff work with the Assessor throughout the project. The Assessor is a key component in that Assessors have knowledge of both the political situation and the potential receptiveness of the property owners. Assessors generally know which special interest groups to target for added attention, have information on current municipal services, and are aware of which local media will enable the best and most exposure.

Vision Government Solutions provides standard information to the client for use in explaining the process. This information includes:

- Company history and experience.
- Initial explanation of the project, its time schedule, breakdown on each phase, and where the property owner can become involved.
- Project update notices on where the project is during each phase (not usually necessary for updates).
- Notification and explanation of the Hearings Process and how homeowners can prepare for them.
- Explanation of the Appeals Process, should property owners still disagree with the new values after hearings.
- Sample letters and articles from other Municipalities positive press experience.

Public Relations Program Steps

1. **Initial Set-up:**

- Assessing the needs via discussion and negotiation prior to signing a contract.
- Conduct Media Research: What papers, radio stations, etc. are in the area, their circulation, the political climate of each publication, etc.

2. **Media Releases:**

- Hold background meeting with local press by phone or in person.
- Press Release announcing the award of the impending revaluation, follow-up with press.
- Press Release announcing the start of the project, the actual steps and time frame involved, follow-up with press.
- Street listing Press Release every month for the duration of Data Collection Phase of project, follow-up with press.
- Press Release announcement of hearings; what to expect and how to prepare, follow-up with press.
- Press release on the results of the revaluation, follow-up with press.
- Generic Question & Answer Brochures.

3. **Media Status Meetings:**

- Client meetings
- Monitor local press

4. **Group Presentations:**

- Business/Commercial Groups, i.e. Kiwanis, Rotary.
- Political Groups; e.g. Selectmen, Aldermen, Finance Boards, et al.
- Preparation of materials and follow-up debriefing memos.

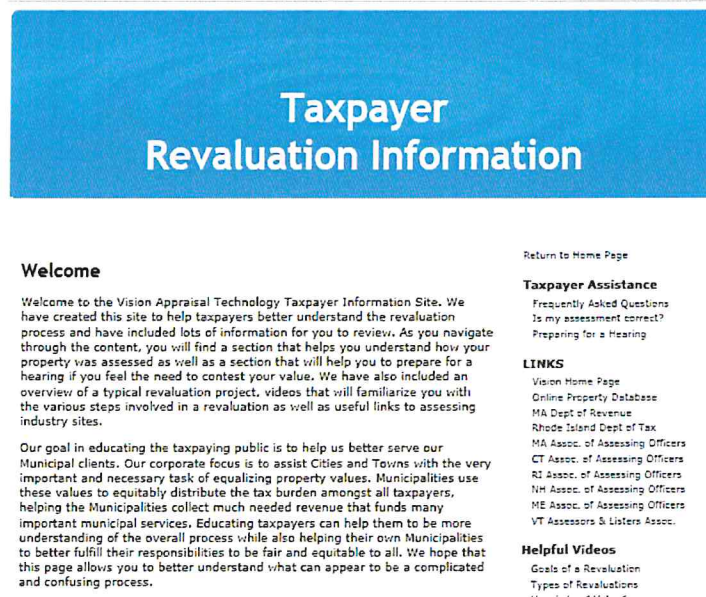
5. **Specialty Items:** Priced outside of the contract.

- Municipality Specific Question & Answer Brochures
- Municipality Specific Revaluation Slide Show

Public Relations via the Internet

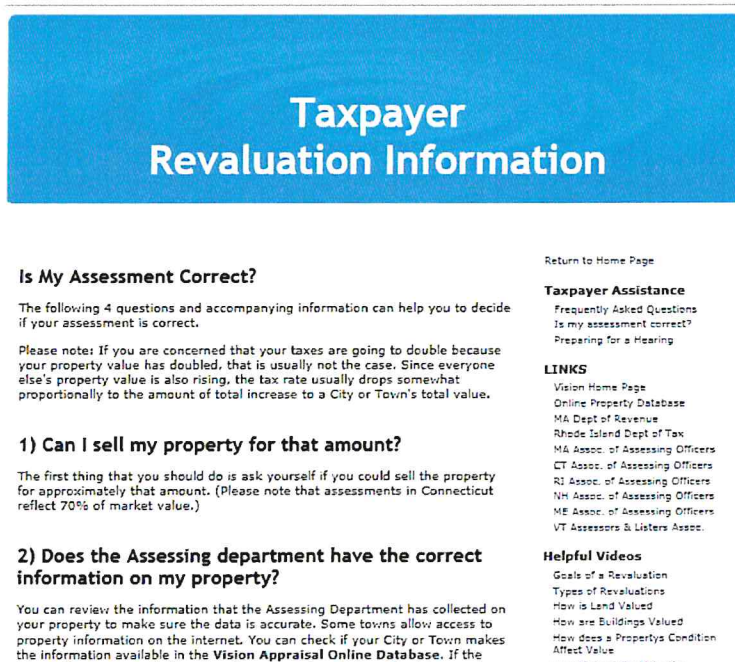
Whether or not the Town decides to publish assessing data on the web, a PR web page can be set up and customized for the Town to help the citizens better understand the revaluation process. Some sample screens are shown below.

Frequently asked questions can be added to address typical taxpayer concerns.



The screenshot shows a website header with the title "Taxpayer Revaluation Information" in white text on a blue background. Below the header, there is a "Welcome" section with a paragraph of text. To the right of the welcome text, there are three columns of links: "Return to Home Page", "Taxpayer Assistance" (with sub-links: "Frequently Asked Questions", "Is my assessment correct?", "Preparing for a Hearing"), and "LINKS" (with sub-links: "Vision Home Page", "Online Property Database", "MA Dept of Revenue", "Rhode Island Dept of Tax", "MA Assoc. of Assessing Officers", "CT Assoc. of Assessing Officers", "RI Assoc. of Assessing Officers", "NH Assoc. of Assessing Officers", "ME Assoc. of Assessing Officers", "VT Assessors & Listers Assoc."). Below the links, there is a "Helpful Videos" section with sub-links: "Goals of a Revaluation" and "Types of Revaluations".

The web site can feature a section that helps taxpayers evaluate whether their assessment is correct by bringing them through a series of questions.



The screenshot shows a website header with the title "Taxpayer Revaluation Information" in white text on a blue background. Below the header, there is a section titled "Is My Assessment Correct?". This section contains a paragraph of text, a "Please note:" section, and two numbered questions: "1) Can I sell my property for that amount?" and "2) Does the Assessing department have the correct information on my property?". To the right of the main content, there are three columns of links: "Return to Home Page", "Taxpayer Assistance" (with sub-links: "Frequently Asked Questions", "Is my assessment correct?", "Preparing for a Hearing"), and "LINKS" (with sub-links: "Vision Home Page", "Online Property Database", "MA Dept of Revenue", "Rhode Island Dept of Tax", "MA Assoc. of Assessing Officers", "CT Assoc. of Assessing Officers", "RI Assoc. of Assessing Officers", "NH Assoc. of Assessing Officers", "ME Assoc. of Assessing Officers", "VT Assessors & Listers Assoc."). Below the links, there is a "Helpful Videos" section with sub-links: "Goals of a Revaluation", "Types of Revaluations", "How is Land Valued", "How are Buildings Valued", "How does a Property Condition Affect Value", and "What is the Difference Between...".

An actual representation of previous assessed values to current sales price can be a great way to explain why assessments have risen to their current level.

Danbury, CT Revaluation Information

Welcome

Welcome to the Vision Appraisal Technology Taxpayer Information Site. We have created this site to help taxpayers better understand the revaluation process and have included lots of information for you to review. As you navigate through the content, you will find a section that helps you understand how your property was assessed as well as a section that will help you to prepare for a hearing if you feel the need to contest your value. We have also included an overview of a typical revaluation project, videos that will familiarize you with the various steps involved in a revaluation as well as useful links to assessing industry sites.

Our goal in educating the taxpaying public is to help us better serve our Municipal clients. Our corporate focus is to assist Cities and Towns with the very important and necessary task of equalizing property values. Municipalities use these values to equitably distribute the tax burden amongst all taxpayers, helping the Municipalities collect much needed revenue that funds many important municipal services. Educating taxpayers can help them to be more understanding of the overall process while also helping their own Municipalities to better fulfill their responsibilities to be fair and equitable to all. We hope that this page allows you to better understand what can appear to be a complicated and confusing process.

[Return to Home Page](#)

Taxpayer Assistance

[Overview of Market Conditions](#)
[Frequently Asked Questions](#)
[Is my assessment correct?](#)
[Preparing for a Hearing](#)

LINKS

[Vision Home Page](#)
[Online Property DataBase](#)
[MA Dept of Revenue](#)
[Rhode Island Dept of Tax](#)
[MA Assoc. of Assessing Officers](#)
[CT Assoc. of Assessing Officers](#)
[RI Assoc. of Assessing Officers](#)
[NH Assoc. of Assessing Officers](#)
[ME Assoc. of Assessing Officers](#)
[VT Assessors & Listers Assoc.](#)

Helpful Videos

[Goals of a Revaluation](#)

We can even offer videos that explain how a revaluation is performed.

Taxpayer Revaluation Information

Goals of a Revaluation



[Click below to view a copy of the chart referred to in this Video.](#)

[Return to Home Page](#)

Taxpayer Assistance

[Frequently Asked Questions](#)
[Is my assessment correct?](#)
[Preparing for a Hearing](#)

LINKS

[Vision Home Page](#)
[Online Property DataBase](#)
[MA Dept of Revenue](#)
[Rhode Island Dept of Tax](#)
[MA Assoc. of Assessing Officers](#)
[CT Assoc. of Assessing Officers](#)
[RI Assoc. of Assessing Officers](#)
[NH Assoc. of Assessing Officers](#)
[ME Assoc. of Assessing Officers](#)
[VT Assessors & Listers Assoc.](#)

Helpful Videos

[Goals of a Revaluation](#)
[Types of Revaluations](#)
[How is Land Valued](#)
[How are Buildings Valued](#)
[How does a Property's Condition Affect Value](#)
[How to Appeal a Valuation](#)

We have found that providing explanations via the web helps tremendously with our PR efforts. We have also been able to measure this need. We have tracked more than 2,000,000 unique hits annually to our Taxpayer Revaluation Information Web Site since December 2005.

STEPHEN WHALEN

PROFESSIONAL EXPERIENCE

VISION GOVERNMENT SOLUTIONS, INC., HUDSON, MA

2005 – Present, Project Manager/Senior Commercial/Industrial Appraiser

Responsible for overall project management and/or commercial/industrial appraisal functions required in connection with revaluation and update projects. Specific expertise in the valuation of commercial and industrial property.

WELLESLEY, MA – ASSESSORS OFFICE WELLESLEY, MA

2008 – Present, Property Appraiser

Field review of all residential properties that have filed a building Permit. Verification of all info on the property card, inside and outside of the property. Re-inspections of property that have filed a tax abatement or have sold within the last year.

WEST NEWBURY, MA -ASSESSORS OFFICE WEST NEWBURY, MA

2005 – Present, Property Appraiser

Field review of all properties that have filed a building permit. Verification of all Building information due to property sales.

SAUGUS, MA -ASSESSORS OFFICE SAUGUS, MA

1999 – Present, Property Appraiser

Interior and exterior inspections of all residential and commercial properties that have taken out a building permit. Re-inspections of all properties that file for a tax abatement. Commercial income and expense analysis. Valuation of commercial and industrial property for state mandated revaluation. Review and approval of the revaluation by the Massachusetts Department of Revenue.

COLE LAYER TRUMBLE, CO. TOLLAND, CT

1987 – 2005, Senior Project Manager

Experienced in all phases of the revaluation process and supervisor on a number of projects in New England. Responsible for the hiring and training of field and office personnel and has assisted in the defense of values at both informal and formal levels. Also responsible for training clients and employees on different valuation analysis software. Other responsibilities include establishing market rents for commercial and industrial properties based on income and expense reports passed in. Utilizing the income, cost and sales approaches to value for state mandated revaluations.

EDUCATION

University Of Massachusetts Boston, MA

Bachelor of Arts Degree –Economics

Southeastern Massachusetts University Dartmouth, MA

Liberal Arts and Computer Science courses

International Association of Assessing Officers Courses:

- Site analysis and evaluation
- Introduction to the cost approach to value
- Introduction to the market approach to value
- Fundamentals of real property appraisal
- Income approach to valuation
- Mass appraisal of residential property
- The Rushmore Model for hotel valuation
- Complex industrial property
- Mass appraisal of high end residences
- Valuation of regional malls and golf courses
- Specialty properties; hospital exemptions and assisted living
- Valuation telecommunications property and wireless technology
- Casino valuation

CERTIFICATIONS

State of Connecticut

Certified for land/residential, commercial/industrial, personal property, and supervisor.

State of New Hampshire

Certified Real Estate Appraiser

JUNE PERRY

PROFESSIONAL EXPERIENCE

VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA

2008 – Present, District Manager

Duties include overseeing all appraisal operations, coordinating large staff of Present appraisers, programmers and support staff and managing annual client consulting services such as revaluations, data conversions, cyclical reinspections, building permit work and defense of values.

2000 – 2007, Project Manager

Responsible for planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential, commercial, industrial, and personal property accounts. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings and all reporting requirements as they relate to project certification.

1991 – 2000, Senior Appraiser

Responsible for the supervision of town-wide revaluations and valuation update projects. Duties include performing all sales analysis, establishing the methodology to be used on the appraisal of residential properties, coordinating field review operations, taxpayer hearings and client consultations. Management assignments include: Glastonbury, Lyme, Watertown, Fairfield Granby, Stonington, New Haven and West Haven, Enfield, Tolland, Connecticut; Leominster, Gardner, Spencer, Westminster, Sutton, and Dudley, Paxton, Massachusetts. Have specific expertise in recreational areas including Martha's Vineyard - Tisbury, Oak Bluffs, and Aquinnah in Massachusetts; Kennebunkport and Cumberland, Maine; Jaffrey and Swanzey, New Hampshire.

1990 – 1991, Staff Appraiser

Responsibilities included the field review of property record cards to verify accurate and critical data for value estimation. Also performing quality control of data throughout the project and supervising daily operations.

1987 – 1989, Senior Data Collector

Responsible for coordinating, supervising and completing the Data Collection Phase of a Revaluation. Duties were to inspect residential and commercial properties, prepare and analyze inspection and production reports and supervise Data Collectors.

EDUCATION

Southeastern Massachusetts University

B.S. in Management

International Association of Assessing Officers

Course I: Fundamentals of Real Property Appraisal

Course II: Income Approach to Valuation

Course 301: Mass Appraisal of Residential Property
Course 302: Mass Appraisal of Income-Producing Property
Course 3: Development and Writing of Narrative Appraisal Reports
Course 400: Assessment Administration

Massachusetts Association of Assessing Officers

Course 1 Comparable Sales Approach to Value
Course 2 Cost Approach to Value
Course 3 Income Approach to Value
Course 5 Mass Appraisal of Real Property
USPAP 15 hour Part 1 &2
USPAP Update - 2008
USPAP Update -2011
USPAP Update -2014-16
USPAP Update -2019

New Hampshire

NH State Statutes Course I
NH State Statutes Course II
NH State Statues One- Day Update November 15, 2019

Appraisal Institute

Standards of Professional Practice - Part A
Standards of Professional Practice - Part B
Updates 2008, 2011, 2014, 2019

Other Courses/Seminars

Basic Appraisal Principles – 28 hours

Market Analysis & Highest and Best Use
Wireless Depreciation & Solar Legislation
Tif's & Pilots
The effect of Casino's
Foreclosures and Short Sales
Pilots and Rural Land
Mold Remediation
GIS & Assessing
Land Valuation and Mass Valuation Process

SPECIAL QUALIFICATIONS

State of Connecticut: Certified Residential, Commercial/Industrial Appraiser and Supervisor #347

State of New Hampshire: DRA Certified Assessor Supervisor #303

Massachusetts Superior Court: Qualified Expert Witness

State of Vermont: Project Supervisor

SANDRA SCHMUCKI

PROFESSIONAL EXPERIENCE

VISION GOVERNMENT SOLUTIONS, INC., HUDSON, MA

2008 – Present, Project Manager

Oversee all assigned appraisal operations; manage support staff and Staff Appraisers; project planning and supervision of multiple projects within the district. Meet with state appointed representatives of Bureau of Assessments for certification of municipality values.

1999 – 2001, Staff Appraiser

Review residential and commercial properties for revaluation purposes. Responsibilities include residential sales review, hearings with taxpayers, update 61A Farm use land value based on clients' data, set condition factors for land based on topography, reconcile income and expense reports with commercial properties on Vision software, and work with Assessor's offices. Experience includes working in Massachusetts, Connecticut, Rhode Island, New Hampshire, and Maine.

1998 – 1999, Crew Chief

Responsible for overseeing the total data collection effort, completing complex data collection assignments which may be beyond the scope of normal data collection personnel, maintaining a high level of operating competence and efficiency, monitor and evaluate the process of data collection personnel.

FRESENIUS MEDICAL CARE NA, NMC HOMECARE, INC., LEXINGTON, MA

1996 – 1998, Accounting Manager

Manage department to account for regional branches with annual revenue of \$100 million. Oversee monthly close of the general ledger. Supervise three accountants and payroll department. Responsible for monthly financial reports for multiple offices, analysis of gross margin and operating costs, oversee billing and collecting accounts receivable. Implement action plan to resolve problem areas on balance sheet and fixed assets. Member of SAP accounting software implementation to resolve Y2K issue, focus on fixed assets and general ledger. Work with human resources, field management and corporate financial departments.

1987 – 1996, Accountant/Accounting Supervisor

Progressive accounting experience working in home healthcare, construction, property management and conference industries.

EDUCATION

University of Massachusetts- Lowell, MA

1987 Bachelor of Science Degree: Business

SPECIAL QUALIFICATIONS

State of Connecticut Office of Policy and Management: Certified Land/Residential Appraiser 2000, 2012. Certified Commercial Appraiser 2013 (valid through April 30, 2023)

State of New Hampshire DRA Certified Real Estate Appraiser 2005, Assessor Assistant 2010, DRA-Certified Property Assessor 2015(valid through December 30, 2020)

State of Vermont Department of Taxation Certified Project Supervisor (through March 2024)

IAAO Course 300 Fundamentals of Mass Appraisal: Certificate of Completion 2000

IAAO Course 201 Appraising Income Properties: Certificate of Completion 2002

IAAO Course 100 Basics of Real Estate Appraisal: Certificate of Completion 2004

MAAO Course 3 – Income Approach to Value: Certificate of Completion 2013

MBREA Course - Basic Appraisal Principles: Certificate of Completion 2018

MBREA Course – Basic Appraisal Procedures: Certificate of Completion 2018

RICHARD T. KULP

MASS APPRAISAL EXPERIENCE

VISION GOVERNMENT SOLUTIONS, NORTHBORO, MA

6/04 – Staff Appraiser/Crew Chief

Present Duties include reviewing accuracy of data by Data Collectors; assisting with public hearings; maintaining production logs both daily and weekly for project managers. Training and experience with Commercial data collection and review. Projects include Arundel, Standish, Camden, Kennebunkport, Winslow, Gardiner and Raymond, Maine; Fremont, Littleton, Manchester and Derry, New Hampshire; Newburyport, Dracut and Harvard, Massachusetts, as well as Danbury, Bristol and Bridgeport, Connecticut.

RE Appraiser Trainee with State of NH and has assisted with field review process in Fremont, Littleton, Dunbarton, Chester, Pelham and Derry, New Hampshire.

02/02- Data Collector

06/04 Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties. Making a thorough inspection of the interior of the property and accurately recording all pertinent data used in the valuation of the property. Experience in working in Hooksett, New Durham, Exeter, Fremont, and Wolfeboro, New Hampshire and York, Kittery, Camden, Standish and Raymond, Maine.

EXPERIENCE

5/00- Tycom Integrated Cable Systems, Newington, NH

02/02 Technical Analyst

11/94- Russound, Inc. New Market, NH

5/00 Inventory Control Team Leader

12/91- Harcourt Home Improvement Co., Nottingham, NH

11/94 Carpenter/Painter/Landscaper

2/86- National Oceanographic and Atmospheric Administration NOAA,

12/91 **Seattle, DC**

Survey Technician

EDUCATION**University of New Hampshire**

B.S. Park Management

Vision Appraisal Technology

80 Hour In-House Training Program

REA1-Real Estate Appraisal Basics – 10220032 (Mass. Board of RE Appraisers)

39 hours

USPAP: Uniform Standards of Professional Appraisal Practice, 2006

JMB Real Estate Academy

Appraising Income Properties – 10180003 (Mass Board of RE Appraisers)

30 hours, 2007

New Hampshire Department of Revenue Administration

Certified Real Estate Appraiser Trainee

Connecticut Office of Policy and Management

Certified Land/Residential Data Collection and Review

WILLIAM DOWNS

PROFESSIONAL EXPERIENCE

VISION GOVERNMENT SOLUTIONS, INC., HUDSON, MA

2013 – Present, Staff Appraiser

CERTIFIED REVALUATION COMPANY, INC. - NORTH PROVIDENCE, RI

2012 – 2013, Data Collector

Measure & List Residential properties, Measure & List Commercial / Industrial properties, Inspect & List Tangible Personal Property accounts.

THYSSENKRUPP INDUSTRY SERVICES - TAUNTON MA

2008 – 2011, Operations Manager

Manage warehousing and fleet operations, Specializing in Commercial Construction.

NEW ENGLAND HEARTH AND PATIO - BARRINGTON, RI

2003 – 2008, Distribution Manager

Managed Warehousing, Distribution, Maintenance, and Customer Service Functions.

AFC CABLE SYSTEMS - NEW BEDFORD, MA

1985 – 2003, Distribution Manager

Managed Distribution center, Warehouse Manager, Dispatcher / Customer Service.

EDUCATION

UMass Amherst, Business Management

Bachelors of Science

SHERYL CLIFFORD

EXPERIENCE

VISION GOVERNMENT SOLUTIONS INC, HUDSON, MA

02/13- **Data Collector**

Pres Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties. Making a thorough inspection of the interior of the property and accurately recording all pertinent data used in the valuation of the property. Additional experience in field review, building permits as well as informal tax payer hearings. Experience working in Casco, North Yarmouth, Brewer, Waterville, Skowhegan, Ogunquit, Wells, Monmouth and Bath, Maine. Also New Durham & Grantham NH. along with Chelmsford Ma., Pawtucket & Providence RI. DRA Certified Building Measurer & Lister.

TRUGREEN LIMITED PARTNERSHIP, RANDOLPH, NJ

06/12- **Commercial Sales Representative**

03/99 Sell lawn & horticultural services to prospective customers, traveling throughout assigned territory. Plans and organizes daily workload according to priority. Generates sales revenue by adding new commercial & governmental accounts. Cross selling & up selling current commercial customers. Quotes prices & prepares sales accounts. Communicates with internal & external customers for the scheduling of appointments & dispatching production. Continuously adapts to changing priorities. Meets all annual departmental goals.

01/97- **Commercial Customer Service Representative**

03/99 Working as a team player with sales & field representatives, maintaining all commercial & governmental accounts. Providing all customer service functions, including data entry of all sales information, tracking sales numbers on a daily & weekly basis & providing sales data to managerial reports. Schedule appointments & dispatch production of lawn & horticulture services.

00/90- **Residential Customer Service Representative**

12/96 Heavy telephone work involving problem solving, answering customer questions & providing solutions, account status in reference to lawn & horticulture information. Quote prices & prepare sales estimates for prospective customers. Reinstate cancelled customers.

06/90- **Field Service Specialist**

06/87 Route driver of assigned area with responsibility of 500 customers. Visit customer properties & explain programs & services for lawn maintenance. Survey property for

square footage, recommend treatments & quote prices. Certified in pesticide application including fertilization, herbicides, insecticides & lime.

EDUCATION

Bloomfield College, Bloomfield, NJ
BS, Business Administration

Becker Junior College, Leicester, MA
AS, Business Administration

Vision Government Solutions
80 Hour In-House Training Program

New Hampshire Certified Measure and Lister

AWARDS/RECOGNITION

Branch Employee Achievement Award, 2002, 2003, 2004, 2006, 2008, 2010, 2011
New Jersey Region Commercial Highest Renewal Percentage Award 2001, 2003, 2004, 2006
New Jersey Region #1 Ranking 2011, East Division #2 Ranking 2011

JOHN MICHAEL TARELLO, MAI, ASA, MBA

PROFESSIONAL EXPERIENCE - VISION GOVERNMENT SOLUTIONS

2016 – Present, Vice President Appraisal Operations

Primary Responsibilities: Organization and oversight of all appraisal personnel and projects within the Company. Coordinate the efforts of district personnel in the completion of all types of appraisal projects throughout Northeast. Develop and implement innovative new appraisal policies and procedures aimed at increasing productivity, accuracy and streamlining the appraisal process. Utilizing new technologies, create product enhancements in response to future appraisal client needs. Coordinate with information systems personnel in the ongoing development of Vision software.

1997 – 2015, District Manager

To oversee and manage appraisal operations for Eastern and Northern New England. Supervise and review appraisers, programmers and support staff in the completion of revaluation projects. Provide individual consulting services and expert testimony for court defense of real estate values. Designed software models for the New York City Assessors Office with over 1.1 Million parcels and managed the software conversion and implementation for Henrico County VA. containing over 110,000 parcels. Managed a staff of 30± clerical and professional employees.

1992 – 1996, Director of Fee Appraisal Division

Developed a Fee Appraisal Division within the company. Designed and implemented various narrative appraisal and income analysis products. Managed a staff of 20± clerical and professional employees.

1990 – 1992, Commercial Senior Appraiser

Primary Responsibilities: Coordinated all aspects of an assigned appraisal project. Completed projects throughout New England, including appraisal assignments and project management in the following towns and cities: Worcester, Auburn, Medford, Revere, Somerville, Chelsea, Massachusetts; Nashua, Seabrook, New Hampshire and New Haven Connecticut.

1987 – 1990, Staff Appraiser

Appraisal assignments throughout New England and New Jersey.

CAMERON BISHOP FINANCIAL SERVICES, STONEHAM, MA

1986 – 1987, Fee Appraiser

QUALITY CONSTRUCTION, INC., LOWELL, MA

1985 – 1986, Builder

EDUCATION

University of Massachusetts, Amherst, Massachusetts

Bachelor of Science (BS): Hotel and Restaurant Management, with a concentration in accounting and finance

Western New England University, Springfield, Massachusetts

Master of Business Administration (MBA): With a concentration in Management Information Systems

Appraisal Institute

Real Estate Appraisal Principles; Residential Valuation; Standards of Professional Practice & Procedures Part A, B & C; Capitalization Theory & Techniques, Part A & B; Case Studies in Real Estate Valuation; Report Writing & Valuation Analysis; Commercial Demonstration Report Seminar; Seminars in Contaminated Properties

International Association of Assessing Officers

Course 302: Mass Appraisal of Income Producing Property; Course 3: Development and Writing of Narrative Appraisal Report

SPECIAL QUALIFICATIONS

Appraisal Institute: Designated Member Appraisal Institute (MAI) #12106 and Past Committee Member of the Technology Committee

Appraisal Institute Massachusetts, Rhode Island Chapter: Past President, Vice President, Treasurer, Secretary, Board of Director, Regional Representative, Chairman of Seminar Committee, the Associates Committee, the News Letter Committee and the Technology Committee

American Society of Appraisers: Accredited Senior Appraiser (ASA), Designated in Real Property/Urban

Massachusetts Board of Real Estate Appraisers: Designated General Appraiser (MRA)

Massachusetts Appellate Tax Board: Qualified as Expert Appraisal Witness

New Hampshire Department of Revenue Administration: Certified as Real Estate Appraiser Supervisor

New Hampshire Board of Tax and Land Appeals: Qualified as Expert Appraisal Witness

Connecticut Office of Policy and Management: Certified as Revaluation Appraiser Supervisor

Vermont Department of Taxes: Certified as Revaluation Project Supervisor

Virginia Department of Taxation: Certified Professional Assessor

Ujenzi Trust: Treasurer and Board of Director

State of Maine: Certified Maine Assessor (CMA)

State of Massachusetts: Certified General Appraiser #660

State of New Hampshire: Certified General Appraiser #154

State of Rhode Island: Certified General Appraiser #A00325G

State of Maine: Certified General Appraiser

State of Connecticut: Certified General Appraiser

State of Virginia: Certified General Appraiser #4001017831

LEGAL ADVERTISEMENT
REQUEST FOR PROPOSALS

The Town of Gorham is seeking proposals for professional consulting services to evaluate and assist in planning for future municipal & school building and facility needs. A detailed scope of services may be obtained by contacting Norman E. Justice, Jr., Facilities Manager, Gorham School Department, 75 South Street, Gorham, ME 04038, or by telephone (207) 222-1147. The deadline for submitting proposals is by 4:00 P.M. on or before Tuesday, September 8, 2020.

Dear:

INVITATION

The Town of Gorham invites your firm to submit a written proposal for providing professional consulting services to evaluate and assist in planning for future municipal & school building and facility needs. A detailed scope of services is suggested below.

If interested, please present ten (10) copies of your proposal to Norman E. Justice, Jr., Facilities Manager, Gorham School Department, 75 South Street, Gorham, ME 04038 by 4:00 P.M. on or before Tuesday, September 8, 2020. The proposal should be clearly marked Proposal for Facility Planning Study along with the day and date on the envelope. Proposals will not be opened prior to that time and proposals received after that time will not be considered.

SCOPE OF WORK

This work shall include, but not necessarily be limited to, the following:

1. Inventory of existing municipal & school facilities.
2. Provide diagrammatic site and floor plans for all existing facilities.
3. Complete an evaluation of existing building conditions; i.e., electrical, plumbing, structural, building envelope, and site conditions to include associated athletic and recreational fields.
4. Provide an analysis of existing space, physical condition, infrastructure systems and the average allowable design populations. Identify deficiencies in space and conditions of existing facilities in relationship to other facilities within the town and throughout Maine.
5. Projection of population including student enrollement projections to the year 2030.
6. **Provide recommendations for any required expansion of municipal and school facilities and alternative use of existing spaces to maximize efficiencies to best serve this projected population and the needs of the community.**
7. Provide diagrammatic site and floor plans showing bulk sizes for all new or expanded facilities.
8. Establish a Facilities Condition Index (FCI) using data from facility condition assessment compared to current replacement value. $FCI = \text{total cost of existing deficiencies} / \text{current replacement value}$. Provide a detailed list of deficiencies and renewal estimates.

PROPOSAL AND SELECTION PROCEDURE

Proposals shall include at least the following items:

1. Names and qualifications of persons in your firm who will conduct the work.
2. Names and qualifications of any subcontractors who may be involved with the work.
3. The project team's specific experience.
4. A detailed outline of the work to be performed.
5. A schedule of major project milestones with estimated dates of completion (Target Project Completion date: No later than March 1, 2021)
6. A compensation package, which would include a breakdown of cost, associated for school facilities and municipal facilities separately.

Proposals from responding firms will be reviewed by a selection committee of the Town of Gorham personnel. Those firms selected for interview will be contacted to arrange a time and date for interview with the committee on or about the week of September 22, 2020. The firm selected to conduct the work will be expected to enter into a contract with the Town of Gorham.

A firm will be selected based on the following criteria:

1. Methods and approach to the project as defined by the Consultant's proposed scope of work.
2. Project team qualifications and experience with projects of this type.
3. Estimated fees and costs for the work.
4. Team ability to perform the work in a timely manner and meet deadlines when established.

GENERAL

The Town of Gorham reserves the right to evaluate the submitted proposals, waive any irregularity therein, and to select any firm that submits a proposal to do the work and/or reject any or all proposals should it be deemed in the best interest of the Town.

All questions related to this proposal should be directed to Norman E. Justice, Jr., Facilities Manager, at 207-222-1147.

Very truly yours,


Norman E. Justice, Jr.
Facilities Manager


OFFICIAL BALLOT – District 30

Maine Municipal Association’s Legislative Policy Committee
July 1, 2020 – June 30, 2022

VOTE FOR TWO:

There were no nominations for this District. If you know of someone interested in serving, please utilize the write-in option.

_____ (name) _____ (position) _____ (municipality) ( write in)

_____ (name) _____ (position) _____ (municipality) ( write in)

Candidate Profiles Are On Reverse Side

MUNICIPALITY: _____ DATE: _____

 **BY SELECTMEN/COUNCILORS:**

signature

print name

signature

print name

signature

print name

signature

print name

signature

print name

Return by 5:00 p.m., August 27, 2020 to:

Laura Ellis, Maine Municipal Association
lellis@memun.org
Fax: 624-0129

LPC Senate District 30

Buxton (part)

Gorham

Scarborough

There were no nominations for this District. If you know of someone interested in serving, please utilize the write-in option.



Town of Gorham Community Development

Thomas M. Poirier, *Director of Community Development*
tpoirier@gorham.me.us
Carol Eyerman, *Town Planner*
ceyerman@gorham.me.us

GORHAM MUNICIPAL CENTER, 75 South Street, Gorham, ME 04038 Tel: 207-222-1620 / Fax: 207-839-4793

TO: Ordinance Committee
FROM: Thomas M. Poirier, Director of Community Development
SUBJECT: Clustered Residential Development Performance Standards
DATE: JULY 13, 2020

IMP

As identified by the Committee at the last meeting, staff made the requested changes to the draft Clustered Residential Development Standards. The committee's proposed changes are shown **bold, underlined, and struck through**. The proposed changes include a requirement for active open space for large scale clustered subdivisions, exemption for invasive species clearing, and inclusions of farmland of state & local importance under high value conservation areas.

At the meeting there were multiple discussions about the Falmouth's Conservation Subdivision standards. Staff attached a copy of Falmouth's standards because it might be helpful for the Committee to see those standards when reviewing Gorham's proposed changes.

Requiring developers to construct active open space to be taken over by the Town might impact the amount of open space collected for the subdivision's approval. This was discussed with the Town Attorney, and there are provisions in the Recreation Impact Fee that would allow the developer to seek a credit for the costs of construction of active open space such as fields, basketball, and tennis courts. Should the Town Council reject the credit in this case, that could open the Town up to a potential lawsuit.

CLUSTERED RESIDENTIAL DEVELOPMENT

A Cluster Residential Development is a form of development which allows a developer to create smaller lots than required by the applicable zoning district regulations in the Rural and Suburban Residential District in return for setting aside a portion of the tract as permanent open space owned and maintained ~~jointly by the individual lot owners~~ a land trust or other conservation organization. The net residential density of the site shall remain the same as if the site were developed as a conventional subdivision. Each dwelling unit in a cluster residential development shall be placed on a separate lot whether the dwelling unit is a single-family dwelling or part of a two-family or multi-family dwelling. The Planning Board ~~may~~ shall approve requests for cluster residential developments if it finds that the proposal conforms to the criteria listed below and is the best development form for the site.

Notwithstanding other provisions of this Code relating to space and bulk, the Planning Board in reviewing and approving proposed residential developments located in Gorham, may modify said provisions related to space and bulk to permit innovative approaches to housing and environmental design in accordance with the following standards. This shall not be construed as granting variances to relieve hardship.

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1. Lot Size shall not be reduced to less than:
 - a. 20,000 square feet in the Suburban Residential District
 - b. 30,000 square feet in the Rural District

2. Frontage – Each lot shall have frontage on a public way or a private street proposed by the applicant, as follows:
 - a. 75’ in the Suburban Residential District
 - b. 100’ in the Rural District
 - c. Up to 10% of the lots in a clustered subdivision may have frontages reduced below the frontage requirements stated in this subsection but not below 25’. Lots with frontage reduced under this provision shall not be adjacent to more than one other lot with such a reduced frontage, as determined at the front lot line.

3. Lot setbacks:
 - a. Front on private way or public street not identified as a collector, arterial, or State DOT designated route: 25’
 - b. Front on a collector, arterial road, or State DOT designated route: 50’
 - c. Rear: 10’
 - d. Side: 10’

Innovative approaches to residential layout and environmental design shall be subject to the following ~~criteria~~ performance standards:

1. ~~The purpose and intent of this Land Use and Development Code shall be uphold~~ minimum common open space requirement shall be:
 - a. At least 40% of the total area of the tract or parcel of land being developed must be maintained as common open space and not be included in the individual building lots.
 - b. The following “high-value conservation areas” shall be considered when determining the area(s) within the subdivision to be allocated to the 40% required common open space.
 - c. Land deemed to be in excess of the 40% requirement up to 50% of the total land area may be required by the Planning Board as additional open space if the area contains land that meets the requirements of the “high-value conservation areas.” The Planning Board must review the overall intent of the chapter as well as the impact on the design of the buildable lots and infrastructure of the subdivision in determining if the additional land should be included in the common open space.
 - d. **Active Open Space shall be required for subdivisions with more than 25 lots and/ or dwelling units. Active Open space is for active recreation and shall include activities which require substantial construction and maintenance for recreation use, including playgrounds, tennis courts, ball fields, basketball courts, and similar facilities. A part or all the active open space may, at the option of the Town, be dedicated for acceptance by the Town for operation as a municipal recreation facility. The following table provides the minimum active open space reservations required in cluster subdivisions:**

<u>Average Density per Dwelling Unit</u>	<u>Active Open Space Required, % of Subdivision Open Space</u>
<u>80,000 s.f. or more</u>	<u>1.5</u>
<u>40,000 s.f. to 79,999 s.f.</u>	<u>2.5</u>
<u>20,000 s.f. to 39,999 s.f.</u>	<u>4</u>
<u>10,000 s.f. to 19,999 s.f.</u>	<u>5</u>

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2. High-value Conservation areas:
 - a. Existing trails (bike, hiking, cross-country skiing, snow shoeing, horseback riding, or snowmobiling) that connect with existing trails on Town-owned land or with existing trails on abutting land protected by a conservation easement or other written agreement.
 - b. Existing healthy, native forests of at least 5 contiguous acres.
 - c. Habitats of endangered or threatened species;
 - d. Significant wildlife habitats as defined by the Maine Department of Inland Fisheries and Wildlife, or the municipality;
 - e. Significant natural features and scenic views such as ridge lines, peaks and rock outcroppings, particularly those that can be seen from public roads.
 - f. Archaeological Sites, historic structures, cemeteries and burial grounds.
 - g. Prime agricultural lands, farm land of state wide, and/or local importance of at least 1 contiguous acre; and
 - h. Land being actively farmed and which will remain active farm land of at least 1 contiguous acre.
3. ~~There subdivision shall be compliance with all State and local codes and ordinances. Each building shall be an element of an overall plan for site development.~~
4. There shall be no approval of any proposed development which exceeds the allowable net residential densities permitted without appeal in the district in which it is located.
5. Residual Common open space shall be usable for recreational or other outdoor living purposes and for preserving large trees, tree groves, woods, ponds, streams, glens, rock outcrops, native plant life and wildlife cover. The use of any open space may be further limited or controlled at the time of final approval where necessary to protect adjacent properties or uses. Residual open space shall be dedicated to the recreational amenity and environmental enhancement of the development and shall be recorded as such. Such dedications may include private covenants or arrangements to preserve the integrity of open spaces and their use for agricultural or conservation purposes.

~~The uses of common open space may include: common open space shall be accessible to the residents of the project. At a minimum, this use may include such activities as walking, picnicking, fishing, swimming, cross country skiing, and other low intensity recreational uses unless otherwise provided for in the Planning Board approval.~~

- a) Passive recreation, such as hiking, walking, running, biking, snowshoeing, cross-country skiing, picnicking, bird-watching, hunting, fishing, and other low-impact recreational activities that do not significantly alter the natural common open space;
- b) Operation of snowmobiles or ATVs on existing snowmobile or ATV trails;
- c) Agriculture, horticulture, silviculture or pasture uses, provided that all best management practices are utilized to minimize environmental impacts;
- d) Nonstructural stormwater management, such as rain gardens and forested buffers;
- e) Easements for drainage, access, and underground utility lines; and
- f) Other conservation-oriented uses such as community garden, compatible with the purposes of this Chapter.

The following uses are prohibited uses of common open space:

- a) Roads, parking lots and impervious surfaces, except as specifically authorized in this chapter;
- b) Subsurface wastewater disposal systems and wells;

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- c) Built stormwater management systems such but not limited to, ponds, underdrain ponds, catch basins, and pipes;
- d) Dumping or disposal of any type of yard waste, household waste, hazardous waste or other debris, organic or inorganic;
- e) Cutting vegetation, except for annual mowing related to agricultural uses or to prevent shrub growth from over taking protected fields, forest management of trees with an approved forest management plan written by a Maine licensed forester or dead, diseased, or dying tree as identified by a Maine licensed arborists. **Removal of invasive species as identified by the Maine Department of Agriculture, Conservation, and Forestry is exempt from this section.**
- f) Altering approved common open space.
- g) Additional structures being placed on the common open space without prior Planning Board approval; and
- h) Other activities as determined by the applicant and recorded on an instrument providing permanent protection such as deed restrictions.

Common Open Space Ownership may include any of the following (with a preference to the order below):

- a) Ownership by a conservation organization approved by the Planning Board with permanent restrictions on its future use; or
 - b) Ownership by the Town with or without a conservation easement to a conservation organization approved by the Town Council and Planning Board;
 - c) Ownership by a homeowners' association **conditioned on forever being maintained as common open space and there shall be no further subdivision of this land, nor buildings constructed upon it without further Planning Board review. The land may also have with a** conservation easement **on it** to the Town or a conservation organization approved by the Planning Board.
6. The first meeting with the Planning Board shall be Conceptual Design Review, and shall precede submission of a Preliminary Subdivision Review Application. The Conceptual Design Review shall include the submission of an Existing Site Resource Map, identifying both significant natural and cultural resources. It is not required that this be an engineered plan but a surveyed plan that shows wetland, shoreland areas, significant habitat corridors, rare or endangered habitat, roads and buildings within 100 feet of the property, indication of overall stormwater flow direction, species and size of existing trees, historic and cultural resources such as existing barns, trails, cellar holes, stonewalls, and other noteworthy features unique to the property. The Existing Site Resource Map shall not include proposed roads or subdivision lots. The intent of this phase of review is for there to be an opportunity to build greater Planning Board, applicant, and open space holder consensus on critical resources and over-all design early in the review process, before the applicant proceeds into formal design of the project. The developer shall include in the over-all design team either a licensed landscape architect or a natural resource planner. The landscape architect or natural resource planner shall provide a written narrative of the existing site resource maps detailing critical areas with a recommendation about the features which should be preserved in the open space.

It is intended that the open shall be designed first, and the built environment shall be constructed in the remaining areas. During the Conceptual Design Review process, the Board shall determine whether or not the open space layout, design and configuration is appropriate based on the size of the parcel to be developed and consistent with the goals outlined under this section and those outlined in the Town's Comprehensive Plan

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The developer shall take into consideration the following points, and shall illustrate the treatment of spaces, paths, roads, service and parking areas and other features required in his proposal:

a) Orientation: buildings and other improvements shall respect scenic vistas and natural features.

b) Streets: access from public ways, internal circulation and parking shall be designed to provide for vehicular and pedestrian safety and convenience, emergency and fire equipment, snow clearance, street maintenance, delivery and collection services. Streets shall be laid out and constructed consistent with local requirements.

Driveways shall be located onto interior road networks to the greatest extent practical. No more than one driveway per 500' of road frontage shall be allowed on any collector roads, arterial roads, or Maine DOT State number routes.

c) Drainage: adequate provision shall be made for storm waters, with particular concern for the effects of any effluent draining from the site. Erosion resulting from any improvements on the site shall be prevented by landscaping or other means.

d) Sewage Disposal: adequate provision shall be made for sewage disposal, and shall take into consideration soil conditions and potential pollution of surface or ground waters. The plans shall show the location of 2 passing soils areas on each lot proposed. One of the test pits should be labeled as primary which will be utilized for the initial construction with the 2nd test pit being identified as reserve and utilized when the first septic system declines.

e) Water Supply: adequate provision shall be made for both ordinary use as well as special fire needs.

f) Utilities: all utilities shall be installed underground wherever possible. Transformer boxes, pumping stations and meters shall be located so as not to be unsightly or hazardous to the public.

g) Recreation: facilities shall be provided consistent with the development proposal.

h) Buffering: planting, landscaping, disposition and form of buildings and other improvements, or fencing and screening shall be utilized to integrate the proposed development with the landscape and the character of any surrounding development. Buffers of at least 75 feet in width shall be created around the entire perimeter of the subdivision unless the subdivision abuts another clustered residential development or the Planning Board finds the design of the subdivision matches the existing development pattern of the area. Where possible, existing trees and vegetation shall be preserved in the buffers, except that invasive vegetation may be removed. The Planning Board may require landscaping or other features as necessary to break up the proposed development from abutting properties should the 75 foot buffer not provide adequate buffering.

i) Disposition of Buildings: shall recognize the need for natural light and ventilation.

7. For purposes of this section, the tract or parcel of land involved must be either in single ownership, or the subject of an application filed jointly by the owners of all the

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property included.

- ~~8.~~ Before the recording of final subdivision plans, or as a condition of final subdivision approval, the Planning Board shall require and accept in accordance with the standards adopted by ordinance, an improvement guarantee in accordance with Chapter 3, Subdivision, Section 3-4., Final Plan, Subsection C., Improvement Guarantee.
- 9 8. Common open space shall be dedicated after approval of the project. There shall be no further subdivision of this land, nor buildings constructed upon it without further planning review and which would cause the net residential density to exceed the density permitted in that district.
- 40 9. The common open space(s) shall be shown on the development plan and with appropriate notation on the face thereof to indicate that it:
 - a) shall not be used for future building lots.
 - b) a part or all of the common open space may, at the option of the Town, be dedicated for acceptance by the Town for operation as a municipal recreational facility.
104. ~~If any or all of the common open space is to be reserved for use by the residents, the formation and incorporation by the developer of a neighborhood association shall be required prior to final plat approval.~~
112. Covenants for mandatory membership in the association setting forth the owners' rights and interest and privileges in the association and the common land, shall be approved by the Planning Board and included in the deed for each lot.
123. This neighborhood association shall have the responsibility of maintaining the common open space(s) and operation and maintenance of local neighborhood recreational facilities within such open space(s).
134. ~~The association shall levy annual charges against all property owners to defray the expenses connected with the maintenance of open spaces and neighborhood recreational facilities.~~
145. The developer or subdivider shall maintain control of such open space(s) and be responsible for their maintenance until development sufficient to support the association has taken place or, alternatively, the objectives of clustering have been met. Such determination shall be made by the Planning Board upon request of the Neighborhood Association or the developer or subdivider.