

April 23, 2018

**REQUEST FOR PROPOSALS
FOR REVALUATION SERVICES
TOWN OF LITCHFIELD, MAINE**

The Town of Litchfield, Maine seeks proposals from qualified Contractors to revalue all real property in the Town, effective April 1, 2019. Contractors interested in providing the revaluation services are invited to submit a copy of their proposal to the Town Manager, Town of Litchfield no later than 6 pm, Monday May 14, 2018. Proposals will be opened by the Litchfield Board of Selectmen/Assessors at their meeting on that date. A decision on the Bid Award will be made at the Litchfield Board of Selectmen meeting on May 28, 2018. The offer of a contract to the winning Contractor is subject to the required funding being approved at the Annual Town Meeting of the Town of Litchfield to be held on June 16, 2018. If approved, a contract for the revaluation will be completed prior to July 10, 2018. For more information, contact the Litchfield Town Office during regular business hours (8:30am – 6pm Monday through Thursday) at 207-268-4721 or write to Town of Litchfield 2400 Hallowell Road Litchfield, ME 04350.

**PROPOSAL
FOR REVALUATION SERVICES
TOWN OF LITCHFIELD, MAINE**

All proposals shall be addressed to: Town Manager, Town of Litchfield 2400 Hallowell Road Litchfield, ME 04350. All bids shall be in writing and placed within a sealed envelope marked “Town of Litchfield, Proposal for Revaluation Services Bid, not to be opened until May 14, 2018” and mailed to or delivered to the Town Office.

The Revaluation Project requires the complete revaluation of all taxable real property, and all tax-exempt real property located within the corporate limits of the Town of Litchfield, Maine.

All information pertaining to the Contractor’s technical and managerial approach to completing this project, as well as the proposed price and timetable, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request for Proposal in order to be considered responsive.

The Town of Litchfield reserves the right to amend this Request for Proposals for Revaluation Services, and the other services described, at any time prior to the deadline for submission for proposals and to reject any or all proposals received if it determines it to be in the best interest to do so.

The Town currently utilizes the TRIO Real Estate & Personal Property software system. The TRIO system will be loaded with all assessment data before the revaluation is completed. All data entry into the TRIO system will be the responsibility of the Contractor. The Contractor shall propose a solution to complete the project without unduly impacting the day-to-day operations of the Town Office or the Assessing Agent's Office.

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

1. A letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor.
2. Reference list including recent municipal revaluations.
3. Resume(s) of key personnel responsible for the project.
4. A list of revaluation contracts for which the Contractor is currently committed.
5. Time schedule filled out according to Contract Specification.
6. Proposed fee payment schedule filled out according to the Contract Specification
7. Description of the Contractor's public relations program that would be used during the revaluation process.
8. Rate per parcel for each property in excess of the current number identified in Contract Specifications

CONTRACT SPECIFICATIONS

SCOPE OF THE REVALUATION PROJECT

- A. Contractor shall furnish all labor, materials, supplies and equipment, and shall perform all work for the project in strict conformity with these contract specifications.
- B. The scope of the PROJECT shall be subject to the approval of the Town. The Town Board of Assessors 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 the Maine Revenue Service.
- C. The values to be determined shall be "just value" as it has been defined in Maine statutes and Maine Supreme Court decisions. The basis of valuation shall be recognized methods of appraising real property, as defined by the Appraisal Institute and International Association of Assessing Officers (IAAO), and as set forth in the Uniform Standards of Professional Appraisal Practice.
- D. The PROJECT shall include the valuation of the following categories of property within the Town:
 1. All taxable real property, including land, buildings and all other types and classes of land improvements.
 2. All tax-exempt property. Decisions regarding the exempt status of such property shall be made by the Town.
- E. The effective date of this revaluation PROJECT shall be April 1, 2019.
- F. The approximate number of land parcels as of April 1, 2018 is as follows:

Taxable and Tax-Exempt parcels: 2,293 Taxable and 113 Tax Exempt
The approximate number of personal property accounts: 195

- G. Pertinent Town Data: Litchfield contains 39.66 square miles, a large rural area, and 11 lakes that is primarily developed with year round homes. The housing in the community is very diverse and includes homes in a wide variety of price ranges.

Other pertinent data includes:

1. Last Completed Land and Building revaluation was in 1995.
2. Estimated Population as of the most recent census is 3,650 .
3. The total area within the Town's corporate boundaries is 39.66 square miles more or less.
4. Estimated number of building permits per year 112, including 21 new dwellings, more or less. (Note: permit numbers are the average of the three prior years, 2014-2016)

GENERAL CONDITIONS

A. PROJECT AWARD

The Town of Litchfield, Maine reserves the right to reject any part of, or all of each bid proposal; to waive informalities and technicalities; and, to accept that proposal or portion of a proposal which the Town in its sole, exclusive judgement deems to be in its best interest. Proposal price shall be a consideration, but lowest price shall not be the sole criterion on which the award shall be based. Consideration shall also be given to the background and experience of the Contractor, the training and experience of its personnel, and its record of achievement. Final acceptance will be subject to contract negotiation.

B. COMPANY

1. CERTIFICATION

Each prospective Contractor must hold, a written certification by the Maine Department of Revenue Services from the time of submission of the proposal issued through the satisfactory completion of all work required herein.

2. PROPOSAL

Each Proposal submitted shall itemize the prospective Contractor's qualifications and experience. The contractor shall submit a list of references.

- C. **PERSONNEL:** Contractor shall provide experienced and qualified personnel employed by it in accordance with the Equal Employment Opportunity provisions of federal and

state governments. Contractor shall submit to the Town written qualifications of all personnel assigned to this project in the form of a detailed, written resume. All personnel assigned to this project shall be subject to the approval of the Town and shall be removed from this project by the Contractor upon written request of the Town.

1. **Office Space, Hours, and Staffing.** The Town shall furnish to the Contractor with sufficient office space, necessary office furniture, access to telephones and copier equipment to carry out the terms of this contract. Contractor shall be responsible for all associate telephone and copier charges and expenses. Contractor shall notify the Town of the names of Contractor's representatives, supervisor, and staff that will be working on the project.
2. **Minimum Qualifications.** The Contractor shall employ qualified personnel to perform the work required in this project. With the exception of data entry and other entry level tasks, personnel shall, at a minimum, possess the minimum qualifications and professional designations established by the Maine Revenue Service, i.e., Certified Maine Assessor (CMA).
3. **Identification.** All Contractor Personnel shall carry suitable ID cards, which will include an up-to-date photograph.
4. **Employment, Release or Transfer.** Whenever new personnel are assigned, transferred from the project, or released from employment, the Selectmen shall be notified in writing of the individuals and assigned duties.
5. **Conflict of Interest.** No resident or Town employee shall be employed by the Contractor on this project without express written consent of the Town of Litchfield Selectmen.

D. PROTECTION OF THE TOWN

1. Indemnification and insurance

- I. The Contractor agrees to defend and indemnify the Town against claims for bodily injury, accidental death, and property damage, which may arise in the course of the Contractor's performance of the contract, and, all other respects, to hold the Town harmless from both inadvertent and negligent acts of the Contractor, its employees, and agents.
- II. The Contractor shall not be responsible for consequential or compensatory damages arising from the late performance or non-performance of the contract caused by special or unusual circumstances beyond its reasonable control, such as acts of God or force majeure.
- III. The Contractor shall maintain automobile liability insurance and workmen's compensation insurance for personnel.

- IV. The Town **may** require the Contractor to submit a Performance Bond in the amount of 100% of the contract through an “A” rated bonding company licensed to do business in the State of Maine.
2. **Failure to Complete by Deadline:** Failure of the Contractor to complete all work prior to June 30, 2019 shall be cause for a payment by the Contractor to the Town of One Hundred Dollars (\$100.00) per calendar day from that date until satisfactory completion of all work. For the purpose of identifying such payments as liquidated damages only, completion of all work is defined to include:
 - I. Completed data collection cards with all measurements and listings.
 - II. Completed review documents.
 - III. Completed hearings and hearing corrections.
 - IV. Completed sales ratio analyses.
 - V. Completed final valuations and total work product tested, reviewed, and delivered.
 - VI. TRIO Real Estate and Personal Property data loaded and fully operational for real estate and personal property.
 - VII. Cards printed and delivered to the Town Office.

Liquidated damages, if applied, shall be deducted from the contract price to the extent there is sufficient undisbursed funds remaining in the contract, exclusive of the retainage, otherwise they will be paid by the Contractor from other courses. Delays occasioned by acts of God, order of court of competent jurisdiction, or force majeure are exempted.

E. COMPLETION DATE AND TIME SCHEDULE

1. Changes and subletting of contract:

- I. Revisions, Modifications, and Subletting: The contractor shall not change, modify, assign, transfer, delegate or sublet the Contract or any interest or part thereof without first receiving written approval from the Town. It shall be mutually agreed and understood that consent by the Town shall not release the Contractor from any contractual responsibility or liability.

2. Time Schedule:

I Revaluation work shall start in the Town no later than thirty (30) days after first signing the contract.

II All corrected and finalized appraisal cards shall be completed and turned over to the Town no later than June 30, 2019 at which time TRIO Real Estate & Personal Property data shall be fully loaded, tested, and operational on the Assessor's computer system.

III Assessment Date: The completed appraisals, upon approval of the Selectmen and Assessor, will be the basis for the municipal property Assessment effective April 1, 2019. All data contained on the appraisal cards, and in the TRIO Real Estate & Personal Property system shall reflect an assessment date of April 1, 2019.

F. PAYMENT SCHEDULE

Payment schedules will be delineated within Bid Proposal and contract. Ten percent (10%) of the total contract price will be withheld until such time as the Selectmen determines that the Contractor has fully and satisfactorily completed all of its obligations and requirements under the contract.