





RFP Proposal No: 14-749T  
RFP Issue Date: May 19, 2014  
RFP Deadline Date: June 9, 2014  
RFP Deadline Time: 11:00 a.m. in Room 313

**REQUEST FOR PROPOSAL**

The Town of Westport, Connecticut, will receive **SEALED PROPOSALS** for the Revaluation of all real property located in the Town of Westport, for the October 1, 2015 Grand List as mandated by C.G.S. §12-62. The Town is seeking proposals from qualified Contractors to assist the Assessor in performing this Revaluation.

Respondents interested in providing the Revaluation service as outlined in the accompanying specifications and in accordance with the conditions and reservations contained within this Request for Proposal (RFP”) will deliver proposals up until 11:00 AM on June 9, 2014 to Mr. Richard Kotchko, Purchasing Officer, 110 Myrtle Avenue, Room 313 Westport, CT 06880. No proposals will be accepted after the date and time. (Refer to PROPOSAL PROCESS, Section II A.1. - Submission of Proposals).

The Town of Westport reserves the right to amend or cancel this RFP at any time if it is in the best interest of the Town. The Town of Westport reserves the right to reject any, or any part of, or all proposals for any reason; to waive informalities and technicalities; and to accept the proposal which the Town deems to be in its best interest, whether or not it is the lowest cost proposal.

Paul Friia  
Assessor

**INFORMATION FOR RESPONDENT**  
**PROPOSAL NUMBER: 14-749T**

**DEFINITIONS**

For the purposes of this RFP the following meanings shall apply:

- a "Appraiser or Appraisal Company" shall mean the appraisal firm(s) assisting the Contractor in the preparation of the Revaluation.
- b "Assessor" means the appointed Assessor of the Town of Westport.
- c "CAMA" means the Vision Government Solutions Computer-Aided Mass Appraisal System in use by the Town as of the date of the Contract awarded hereunder.
- d "Contract" means the agreement awarded to the Contractor and signed by the Contractor and the Town which shall incorporate all terms and specifications of this RFP.
- e "Contractor" shall mean the successful respondent to whom the Contract is awarded.
- f "Full Measure and List" shall mean an inspection of all exterior and accessible interior areas of the building, identifying all architectural details, quality of construction, and conditions that are pertinent to the valuation of the building. In addition, it will also include an exterior measuring of all improvements to verify and determine the size of the improvements and outbuildings. This inspection will include an exterior photograph and will apply to residential and commercial properties.
- g "Interior Inspection" shall mean an inspection of all accessible interior areas of the building, identifying all interior architectural details, quality of construction, and condition that are pertinent to the valuation of the building. It will also include an exterior viewing of the property in order to verify or correct any physical details to structural improvements attached to a property. This inspection will not require any exterior measuring of any structural improvements unless during the verification process, an error is identified. This inspection will not include exterior photographs. This definition will apply to residential and commercial properties.
- h "Modified Measure and List" shall mean an inspection of all accessible interior areas of the building, identifying all interior architectural details, quality of construction, and conditions that are pertinent to the valuation of the building. It will include the verification through a partial measurement of the structure in order to verify or correct any physical details to structural improvements attached to a property and an exterior viewing of the areas of the improvements that were not measured. This inspection will require that the data collector make a complete measuring of two sides of the main structure. If during this process an error is identified, then a complete measuring of the improvements will be required. This inspection will include an exterior photograph and will apply to residential and commercial properties.

- i “Property Classification – I” means homes that are generally smaller than 4500 square feet of living area and modest architectural detail. This classification of residential homes will include single family homes, condominiums, and co-ops. These homes are included in the Specified Properties (see below).
- j “Property Classification - II” means homes that are generally larger than 4500 square feet in size (approximately 1350) and will include homes of the highest quality in Westport. Property Classification – II will also include commercial properties (approximately 375). It will require a data collector with a higher degree of real estate experience to properly inspect, grade, measure and value. These properties are included in the Specified Properties (see below).
- k "Respondent" means the firm responding to this RFP.
- l “Revaluation” means the revaluation of all real property, commercial and residential, within the corporate limits of the Town for the 2015 Grand List, in accordance with the conditions and specifications of this RFP.
- m “Revaluation Project Report” means the documents prepared by the Contractor following the completion of the Revaluation.
- n “Specified Properties” means all properties (residential and commercial) that either have not had an interior inspection and an exterior measuring or have had **only** an exterior measuring by the Assessor’s Office since 2008. A full list of these properties will be provided to the Respondent at the time of revaluation or upon request.
- o "Town" means the Town of Westport.

## **I. GENERAL INFORMATION**

### **A. SCOPE OF REVALUATION**

The project is for the Revaluation of all real property (10,588 parcels) in the Town of Westport included in the following categories:

1. Taxable real estate, land, buildings and improvements
2. Exempt real estate, land, buildings, and improvements
3. Public utility real estate, land, buildings and improvements

Of the 10,588 properties, approximately 9,200 will require an inspection.

The Revaluation will include a Full Measure and List or a Modified Measure and List of approximately 8230 Specified Properties. The Revaluation will also include an additional Interior Inspection of approximately 370 Specified Properties. (See Paragraph C below). A viewing of approximately 600 vacant parcels is also required. Additionally, properties that have building permits and properties that are included in the sales verification process will also require an inspection.

(Reference is made to “Building Permit” in Section V and “Sales Verification” in Section VI and of this RFP).

The assessed values to be determined shall be seventy (70) percent of the full fair market value as defined in Section 12-63 of the Connecticut General Statutes and shall be based on recognized methods of appraising and conform to USPAP (Uniform Standards of Appraisal Practice).

The Contractor shall furnish all of the databases, labor, materials, supplies and equipment and perform all work for the Revaluation project in strict accordance with the specifications herein.

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

## **B. SOFTWARE**

Presently, the Town has the Vision Government Solutions software (Version 6.4) in-house. The Contractor shall be required to perform the Revaluation using this software. The Contractor shall be responsible for obtaining at its sole expense, any software, software support or licensing required to complete the Revaluation. Currently the Town uses Quality Data Service for its Administration/Tax Billing software.

## **C. PROPOSAL**

The Town is requesting that responses to this RFP include proposals for both of the following options, each of which shall include separate fee proposals:

**Option 1:** The Revaluation of all real property in the Town of Westport (10,588 parcels) to include a Full Measure and List of 8230 Specified Properties as well as an Interior Inspection of approximately 370 Specified Properties. A viewing of approximately 600 vacant parcels is also required.

**Option 2:** The Revaluation of all real property in the Town of Westport (10,588) to include a Full Measure and List of all properties identified in Property Classification - II and Condominiums (approximately 2,300 Specified Properties). A Modified Measure and List of all Property Classification – I and an Interior Inspection of approximately 370 Specified Properties. A viewing of approximately 600 vacant parcels is also required.

Neither option will require the inspection of approximately 1450 properties that have received a Full Measure and List since 2008.

These options should be considered together with all other requirements contained in this RFP (including but not limited to Section V, Responsibilities of the Contractor and Section VI, Appraisal Specifications).

The Contractor will be assisted with the development of commercial valuations by an independent commercial Appraiser that will be chosen by the Assessor. The Contractor will provide to the Appraiser all documentation and information requested by the Appraiser in whatever form requested. Coordination with the Appraiser will be necessary with regards to inspection of the commercial real estate. Any disagreement between the Contractor and the Appraiser shall immediately be brought to the attention of the Assessor, with the final decision being that of the Assessor.

In addition to the foregoing, all information pertaining to the Contractor’s technical and management approach to completing the Revaluation, as well as the proposed cost, timetable and staffing plan, shall be presented in the proposal (see Section II A(2)). The proposal must address, at a minimum, each of the items as set forth in Section II A(2) of this RFP as well as any addendums in order to be considered responsive.

Any proposal, which does not respond to each issue in the RFP, may be rejected by the Assessor as non-responsive.

**D. TOWN DATA**

The Town of Westport is contained within 22.4 square miles. The 2010 Census indicated the Town’s population is 26,391. The last Town-wide Revaluation of property in Westport was completed in 2010. Assessors’ maps are updated annually. The approximate composition of property types in the Town of Westport is delineated in the following table:

PROPERTY CLASS:	TOTAL PARCELS:
Residential (single family, Condo, 2-4 units)	9441
Apartments (5+ units)	11
Vacant Land (Residential & Commercial)	611
Commercial	409
Industrial	7
Public Utility	9
Use Assessment	12
Exempt (Residential/Commercial)	67
 TOTAL PARCELS	 10,588
 Total Real Estate Grand List – 2012 (Including Exempt Properties)	  \$10,409,004,510

Current assessment and selling price statistics compiled by the Westport Assessor’s Office for the period of October 1, 2012 through September 30, 2013 are as follows:

Total Real Estate Sales	572
Total “Useable” Sales	368
Annual Building Permits (annual est.)	775
Total Residential – Useable Sales	342
Median Selling Price – Residential	\$1,344,000

Minimum Sale Price – Residential	\$172,000
Maximum Sale Price – Residential	\$18,000,000
Median Size- Residential building	3,220 sq ft
Median Year Built - Single family	1977

## **II. PROPOSAL PROCESS**

### **A. PROPOSAL SUBMITTALS**

#### **1. Submission of Proposals**

Proposals must be in a sealed envelope clearly marked RFP 14-749T "Assessor Revaluation Proposal." The envelope shall then be placed in an outer envelope which shall be securely sealed and addressed to: Mr. Richard Kotchko, Purchasing Officer, 110 Myrtle Avenue, Room 313 Westport, CT 06880. It shall bear the name and address of the Respondent and the designation of the RFP to which the proposal refers. RFP proposal numbers must appear on all proposals and related correspondence.

Please submit one (1) original and two (2) hard copies and one (1) electronic version of the proposal. Please provide the **electronic** version on a CD or memory stick. **No email submittals will be accepted. The proposals will be opened immediately in a Town Hall Conference room. All respondents are invited to attend the opening.**

#### **2. Preparation of Proposal**

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

- (i) A letter of transmittal, including a Corporate Resolution (if Respondent is a corporation), signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least ninety (90) days from the deadline for the submission of proposal. Also include the name and telephone number of person(s) to be contacted for further information and clarification.
- (ii) Copy of the Respondent's financial statements for the last two (2) fiscal years. The Town reserves the right to request additional financial information relative to the Respondent's financial stability.
- (iii) Summary of Proposal's advantages and strengths.
- (iv) Copy of the Respondent's current Connecticut Revaluation Certification.
- (v) Indication of years the Respondent has been engaged as a company, corporation, partnership, or individual specializing in municipal Revaluation services.



- (vi) Listing of all municipal Revaluations completed during the past five (5) years, including client contact, telephone number, size of municipality, scope of services rendered and date completed.
- (vii) A listing of any lawsuits against Respondent by any government entity in the last three (3) years for which Respondent has performed services.
- (viii) A listing of all Revaluations, now underway or under contract, telephone number, size of municipality, scope of services to be rendered, and date completed or to be completed.
- (ix) A listing of any lawsuits against Respondent by any government entity in the last three (3) years for which Respondent has performed services.
- (x) A listing of all Revaluations, now underway or under contract, telephone number, size of municipality, scope of services to be rendered, and date completed or to be completed.
- (xi) Written assurances that the Revaluation will meet the Assessor's Certification Requirements.
- (xii) Listing of personnel to be assigned to the Revaluation project, including years of experience in current positions and other revaluation or appraisal positions, Connecticut State Certifications, municipalities served, and their roles in those revaluations. Proposals must identify a Project Manager, Field Appraisal Supervisor, Residential Appraiser, Commercial Appraiser and the number of data collectors to be utilized. Also identify the personnel role/responsibilities and minimum number of days committed to this project. Identify other projects each individual is currently assigned to and their anticipated completion date of that assignment. Resumes of personnel assigned shall also be included.
- (xiii) Create a work-plan that addresses the key tasks and respective completion dates outlined in Section III (L) in this RFP. The work-plan should include each task, completion date and person responsible for completing the identified tasks.
- (xiv) Description of the methodologies used for assessing values for residential, commercial, industrial, condominium and vacant land parcels.
- (xv) Description of sales analyses performed to verify accuracy of valuations.
- (xvi) Description of verification process for sales used in the sales analysis.
- (xvii) Description of the proposed public relations program that would be used during the Revaluation.
- (xviii) Create a work-plan that addresses maintaining both CAMA systems with the most current information. (See Section V, Paragraph F)

- (xix) Respondent Proposal Form Agreement – This form is found in Appendix A and should be completed in its entirety.
- (xx) Respondent Non-Collusion Agreement – This form is found in Appendix C and should be completed in its entirety.
- (xxi) Description from Senior Commercial Appraiser of Respondent as to how he will work with Appraiser in developing Commercial property values.
- (xxii) Description from the Senior Field Appraiser Supervisor of Respondent who will assist with the valuation of waterfront or water influenced properties.
- (xxiii) A list of towns where the Respondent has performed a revaluation using the VISION Government Solutions software as the CAMA system.
- (xxiv) Willingness to use and experience with Town’s current CAMA system, Vision Appraisal Technologies latest version.

### **3. Oral Proposals and Presentations**

At the option of the Town, oral presentations may be requested. However, selection may be based solely on the proposals received.

### **4. Bid Bond**

A Bid Bond or certified check in the amount of 10% of the highest proposal amount must be submitted by the Respondent with his proposal as a guarantee that, if awarded the Contract, he will execute the Contract as presented to him and furnish a Performance Bond satisfactory to the Finance Director of the Town within two weeks after the receipt of the notice of award. Should Respondent fail to comply with the provisions of this paragraph, the parties agree that the resulting damages to the Town are not readily ascertainable, that there will be uncertainty and delay for the Town in finding another acceptable Respondent, and resulting expense and inconvenience. Therefore, to avoid controversy, the parties agree that the Town may call the Bid Bond without objection by Respondent or retain the funds paid to the Town by respondent as reasonable liquidated damages for respondent’s failure to comply with the provisions of this paragraph.

### **5. Taxes**

Since the Town of Westport is exempt from all taxes, no charges for taxes of any kind should be included in your proposal or on any invoices to the Town.

### **6. Contract Documents; Exceptions**

The terms of this RFP will be incorporated into the Contract awarded to the successful Respondent. (See Appendix B) Therefore, any exceptions to the terms of the RFP must be noted in the Proposal. Attachments to the Proposal must be in addition to, not in lieu of, the provisions of the RFP. Any conflict between provision(s) of the Contract, the RFP, the proposal or other

attachments or exhibits will be resolved in favor of the provision which provides for a higher standard of obligation or service by the Contractor and a lower measure of liability for the Town.

## **7. Withdrawal of Proposal**

Any proposal may be withdrawn prior to the above-scheduled time for receiving proposals, or any authorized postponement thereof. Any withdrawal shall be effective only if delivered to the Assessor in writing prior to the opening time set forth above. Any proposals received after the date and time specified will NOT be considered. No Respondent may withdraw a proposal within 90 days after the actual opening thereof.

## **8. Inquiries**

Any questions regarding the RFP's content and/or intentions will be addressed and clarifications will be made. The Town of Westport requests that all questions and/or clarifications be received in writing or email to the Assessor no later than 4:30 P.M. on May 30, 2014. Please address your letter or email to the following address:

Paul Friia  
Assessor  
Town of Westport  
110 Myrtle Avenue  
Westport, Connecticut, 06880  
203-341-1135  
Email address: [pfriia@westportct.gov](mailto:pfriia@westportct.gov)

Any responses to these questions shall be posted on the Town's website, [www.westportct.gov](http://www.westportct.gov), and sent to any Respondent who has provided an e-mail address for this purpose.

Additionally, after proposals are received, the Town reserves the right to communicate with any or all of the Respondents to clarify the provisions of this request. The Town further reserves the right to request additional information at any time after proposals are opened.

## **9. Reservations**

The Town of Westport reserves the right, in its sole discretion to reject any or all Proposals or parts of Proposals for any reason whatsoever; to waive informalities in said proposals; or to accept any Proposal or part thereof deemed to be in the best interests of the Town of Westport.

The Town of Westport reserves its right to cancel, revoke, rescind or nullify any proposal award, without penalty, if the State of Connecticut passes any act or amends any of the statutes or regulations, affecting the timing, method or requirements of the Revaluation process.

The Town reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal was selected. Submission of the proposal indicates acceptance by the firm of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the Contract between the Town and the Contractor selected.

## **B. PROPOSAL EVALUATION CRITERIA**

The criteria upon which proposals will be evaluated include, but are not limited to, the following:

1. Directness of response to the specifications.
2. Cost of the project will be considered, but will not be the sole basis for evaluation. Respondents must demonstrate that they are qualified and responsible as well.
3. Prior experience.
4. Nature and size of Respondent's organization and familiarity with the area.
5. Quality of similar projects Respondent has completed in the past.
6. Project timetable.
7. Range and completeness of the public information program.
8. Completeness to the questions posed to each Respondent by Selection Committee.

## **C. NOTICE OF AWARD**

A Notice of Award will be issued to advise the successful Respondent of the intended award of the Contract, and of Respondent's obligations to the Town in the way of proposal documents Respondent has to furnish, including the Performance Bond and the required Insurance Certificate (as covered in Section III). Until the successful Respondent meets these obligations, the Respondent is forbidden to proceed with the Contract. The Contract is subject to the approval of the Board of Selectmen.

## **III. GENERAL CONDITIONS**

### **A. BONDING**

The Contractor shall furnish to the Town a performance surety bond in the amount of the Contract price, which bond shall be issued by a bonding company authorized to do such business in the State of Connecticut with a minimum A.M. Best Company rating of A+ or specifically approved by the Town of Westport. Said bond shall be in a form satisfactory to and approved by the Town Attorney and shall be delivered to the Town for the Attorney's review prior to the signing of the Contract.

It is understood and agreed that upon the satisfactory completion of the Revaluation, the performance bond shall be reduced to 10% of the value of the Contract. This is for the purpose of assuring that the Contractor will assist and cooperate in the defense of all appeals taken by taxpayers. This reduced amount of bond shall become effective after the Revaluation has been completed and has been approved by the Assessor and after the completion of the duties of the Board of Assessment Appeals. The reduced amount of the bond shall remain effective until a final resolution in the courts of any appeal taken from the actions of the Board of Assessment Appeals on the list of October 1, 2015.

The successful Respondent to whom the Contract is awarded must file the required Performance Bond within two weeks of the date of notification of award. Failure or neglect to do so may be considered by the Town as proof that the Contractor is unable to fulfill the Contract.

## B. INSURANCE

The Contractor shall procure, at its own expense, and maintain for the duration of the Contract insurance against claims for injuries to persons or damages to property which may arise from, or be in connection with the performance of the work hereunder by the Contractor, its agents, representatives, or employees.

### 1. Minimum Scope and Limits of Insurance

- (i) Broad Form Commercial General Liability: \$1,000,000 per occurrence/ \$2,000,000 aggregate for bodily injury, personal injury, property damage, and products/completed operations.
- (ii) Automobile Liability: \$1,000,000 combined single limit per occurrence for bodily injury and property damage.
- (iii) Workers' Compensation Limits: as required by State of Connecticut Labor Code.
- (iv) Professional Liability: \$1,000,000 per occurrence; \$2,000,000 aggregate.
- (v) Adequate insurance to cover the value of personal property (including, but not limited to, personal computers) belonging to the Contractor while located on Town property, while in use or in storage, for the duration of the Contract.

### 2. Notice of Cancellation or Non-renewal

Each insurance policy required hereunder shall be endorsed to state that coverage shall not be suspended, voided, canceled, or reduced, either in coverage or in limits, except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the Town.

### 3. Other Insurance Provisions

The policies are to contain, or be endorsed to contain, the following provisions:

- (i) Liability (General, Automobile, and Professional) Coverage:
  - A. **"The Town of Westport and its respective officers, agents, officials, employees, volunteers, boards and commissions"** are to be named as additional insured with regards to liability arising out of activities performed by or on behalf of the Contractor;. A copy of the additional insured endorsement shall be included with the certificate of insurance.
  - b. The Contractor's insurance coverage shall be the primary insurance as regards the Town. Any insurance or self-insurance maintained by the Town shall be in excess of the Contractor's insurance and shall not contribute with it.

(ii) Workers' Compensation and Employer's Liability Coverage:

- a. If State statute does not require the Contractor to obtain Workers' Compensation insurance, then the Contractor shall furnish the Town with adequate proof of the self-employment status. The Contractor agrees to waive all rights of claims against the Town for losses arising from the work performed by the Contractor. In the event that during the Contract this self employment status should change, the Contractor shall immediately furnish proper notice to the Town and a Certificate of Insurance
- (iii) Waiver of Subrogation. The insurer shall agree to waive all rights of subrogation against the Town for losses arising from the work performed by the Contractor for the Town.

**4. Acceptability of Insurers**

- (i) Insurance is to be placed with insurers which have a Best's rating of at least A.
- (ii) Insurance companies must either be licensed to do business in the State of Connecticut or be deemed to be acceptable by the Town's Finance Director.

**5. Verification of Coverage**

The Contractor shall furnish the Town with certificates of insurance effecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by the insurer to bind coverage on its behalf. The certificates and endorsements are to be received and approved by the Finance Director before work commences. Renewal of expiring certificates shall be filed thirty (30) days prior to expiration. The Town reserves the rights to require complete, certified copies of all required policies, at any time.

The successful Respondent to whom the Contract is awarded must file the required Insurance Certificates **within two weeks** of the date of notification of award. Failure or neglect to do so may be considered by the Town as proof that the Contractor is unable to fulfill the Contract.

**C. COPYRIGHT LIABILITY**

The Contractor shall indemnify and hold the Town harmless from liability of any nature or kind, including costs, expenses and attorneys fee for or on account of any patented or copyrighted equipment, materials, articles, or processes used in the performance of the Contract.

**D. INDEMNIFICATION**

The Contractor agrees to indemnify, hold harmless and defend the Town, including but not limited to its elected officials, officers, and employees from and against any and all liability for loss, damage or expense which the Town may suffer or for which the Town may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the performance of the Contract, whether or not due in whole or in part by any act, omission or negligence of the Town or any of its representatives or employees.

## E. REVALUATION CERTIFICATE

The Contractor must hold from the time of submission of the proposal through the completion of the Revaluation Project, a valid Connecticut Revaluation Company Certificate pursuant to Section 12-2c of the Connecticut General Statutes.

## F. PERSONNEL

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

**The Assessor will request and have the final decision as to the specific personnel that will be assigned to perform all tasks related to the Westport Revaluation.** The ability of the Contractor to commit these people for the duration of the project will have a direct impact on the awarding of the Contract.

### 1. Qualifications of Personnel

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

The Town must approve any changes to the Contractor's staffing as outlined in their proposal. Any proposed new or replacement staff are subject to the approval of the Assessor.

The Contractor will not allow any on-the-job training of their new employees in the Town of Westport while the Revaluation is underway without the consent of the Assessor.

### 2. Minimum Qualifications

#### (i) Project Manager

The administration of this project shall be assigned by the Contractor to the Project Manager, who shall be certified by the State of Connecticut as a Revaluation Supervisor and who, preferably, shall have not less than ten (10) years of practical appraisal experience in the appraisal of residential, commercial, industrial, and special use property appraisal. The Project Manager shall be available on a bi-weekly basis to meet with the Assessor to discuss matters relating to the Revaluation project.

#### (ii) Field Appraisal Supervisor

The Field Appraisal Supervisor will be the primary, on-site supervisor for the Revaluation. This individual shall be certified by the State of Connecticut as a Revaluation Supervisor and who, preferably, shall have not less than seven (7) years of property assessment experience. The Field Appraisal Supervisor must be available at all times for immediate resolution of any daily operational or public relations issue.

(iii) Senior Commercial Appraiser

The Senior Commercial Appraiser shall be certified under the Connecticut Revaluation Program and who, preferably, shall have an MAI designation and shall not have less than seven (7) years of practical experience in the appraisal of commercial, industrial, and special use property appraisal.

(iv) Reviewers and Appraisers

Reviewers and appraisers working for the Contractor shall be certified under the Connecticut Revaluation Certification Program, and preferably shall not have less than five (5) years of practical experience in the appraisal of the particular types of properties for which they are responsible. Two (2) years of this experience shall been in the mass appraisal field and shall have occurred within the past eight (8) years.

(v) Data Collectors – Level 1 and Level 2

Level 1: Data Collectors shall have at least one (1) year experience in the appraisal or municipal Revaluation field. Any person, who does not meet these qualifications, must work under the direct supervision of an appraiser or Project Manager. No more than four (4) different data collectors of this level will be assigned to the Revaluation without the approval of the Assessor. Minimum age for a data collector is twenty-one (21) years old. Data collectors in this classification will have the ability to inspect homes only identified in the Property Classification - I category and building permits up to \$250,000, unless approval is given by the Assessor.

Level 2: Data Collectors shall have at least five (5) years experience in the appraisal or municipal revaluation field. In addition, the data collectors must have extensive experience in inspecting and measuring homes of similar quality and size as identified in Property Classification – II and building permits associated with properties of this value. No more than two (2) different data collectors of this level will be assigned to the Revaluation without the approval of the Assessor.

(vi) Data Entry

The Data Entry personnel shall have at least (2) years experience entering field data. They must have entered data from at least one other revaluation into Vision Government Solutions software (Version 6.4) or demonstrate that they have extensive knowledge of the software. No more than two (2) different data entry personnel will be assigned to the Revaluation without the approval of the Assessor.

## **G. OFFICE HOURS AND STAFFING**

The Contractor shall maintain an office in the Westport Town Hall from the commencement of work on the Revaluation through the conclusion of the informal hearings. This office shall be staffed at the Contractor's expense with clerical staff as well as other qualified and certified full-time persons as needed so as to insure their successful completion of the Revaluation, in accordance with the



completion dates set forth in Section III, Paragraph L, hereof and any addenda hereto. The Contractor will be responsible for responding to voice messages from residents until the completion of the Revaluation. Any change in hours or personnel must receive prior written approval by the Assessor. At the commencement of the Revaluation, the Contractor shall be provided one (1) telephone with one (1) telephone number by the Town. At the discretion of the Assessor, the Contractor may be required to add additional telephone lines in preparation for the informal hearings. The Contractor shall be responsible for all monthly charges on such additional lines.

#### **H. IDENTIFICATION**

All field personnel shall carry visible identification cards supplied by the Westport Police Department. Such cards shall be laminated and include a recent photograph. These cards will be relinquished at the completion of their duties. All motor vehicles used by field personnel shall be registered with the Assessor's office and the Police Department, giving license number, make, model, year and color of vehicle. The Town will provide each field person with a magnetic "Town of Westport" sign that will be used on their vehicles for identification. In addition, all field personnel shall carry a "Letter of Introduction" signed by the Assessor.

#### **I. BACKGROUND CHECK**

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

#### **J. CONFLICT OF INTEREST**

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

#### **K. DRESS CODE**

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

#### **L. COMPLETION DATE AND TIME SCHEDULE**

Within two (2) weeks after receipt of notice of award by the Town and subject to the approval of the Town's Board of Selectmen, the Contractor shall execute with the Town, a Contract and shall, within two weeks after signing of the Contract, commence the Revaluation and continue uninterrupted in a diligent fashion so as to ensure completion within the schedule of completion dates hereinafter set forth. **Time is of the essence.**

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

- (i) July 1, 2015: Complete all residential and commercial inspections, (except for current building permits) data mailer information, and all data collection and input of Specified Properties.
- (ii) Callbacks to all non entry property owners will be made immediately after initial data collection is completed and will continue throughout the project.

- (iii) Data Mailers will be sent out to property owners immediately after inspections and data entry is complete.
- (iv) April 1, 2015: Complete preliminary land study and values. Values are to be continuously updated until October 1, 2015.
- (v) June 22, 2015: Complete study of market rents, expenses and capitalization factors. Values are to be continuously updated until October 1, 2015.
- (vi) July 13, 2015: Complete all preliminary building cost values. Values are to be continuously updated until October 1, 2015.
- (vii) August 31, 2015: Complete preliminary building cost manual.
- (viii) September 28, 2015: Review all final commercial values with Contractor and Appraiser and Assessor. Values are to be continuously updated until October 1, 2015.
- (ix) October 6, 2015: Complete inspection of building permits of up to \$250,000 and additional sales occurring until October 1, 2015.
- (x) October 9, 2015: Deliver completed CAMA database, integration of CAMA software with administrative software, video images and Assessor property field cards with all measurements, listings, sketches, pricing, suggested values.
- (xi) October 9, 2015: Submission of preliminary performance testing standards.
- (xii) October 30, 2015: Assessor completes review and final adjustments made for real estate property.
- (xiii) November 6, 2015: Assessment change notices mailed to comply with requirements of Connecticut State Statutes.
- (xiv) November 6, 2015: Public internet access to field card information.
- (xv) November 20, 2015 - December 13, 2011: Informal hearings.
- (xvi) December 30, 2015: The CAMA file will be updated with final assessments and all notices with the results of informal hearings will be completed and mailed out on forms approved by the Assessor.
- (xvii) December 30, 2015: Submission of final Performance Testing Standards.
- (xviii) January 8, 2016: Mail notice of results of Informal Hearings.

## M. PAYMENT SCHEDULE

Payments shall be made in the following manner:

### 1. Certification

At the end of each thirty (30) day period during the term of the Contract (“Reporting Period”), the Contractor is to certify in writing in the form of a progress report to the Assessor, the percentage of the total work completed under the Contract which the Contractor has performed during the said 30-day period. Such report will itemize and accurately indicate the extent and nature of the work performed by volume, street, category, or in any other manner required by the Assessor. The itemization shall be categorized by each of the “Stages of Completion” listed on the Revaluation Payment Schedule list.

#### Revaluation Payment Schedule

<u>Item</u>	<u>Stages of Completion</u>	<u>% of Total</u>
1.	Bonding, Office Set up, and Project Start up	5%
2.	Field Inspections and Data Collection	20%
3.	Data Entry	10%
4.	Data Mailers sent and data inputted	5%
5.	Valuation Analysis	10%
6.	Field Review and Data Entry	5%
7.	Final Valuations and Assessment Notices Mailed	25%
8.	Informal Hearings, Re-inspection, Adjustments complete	10%
9.	Board of Assessment Appeals Completion of Duties	10%
10.	Litigation (Included in Performance Bond)	0%
11.	TOTAL	100%

### 2. Periodic Payments

The Town, upon determination by the Assessor that the certification of the Contractor concerning work performed during a Reporting Period is accurate, will pay to the Contractor a percentage of

the total compensation under the Contract equal to the percentage of the work certified as having been completed during said Period, less ten (10%) percent which is to be retained by the Town for payment to the Contractor at such time that it has performed fully and satisfactorily all its obligations, requirements, and litigation under the Contract. The retained ten (10%) percent of the Contract price is to be paid upon the completion of the work of the Board of Assessment Appeals for the October 1, 2015 Grand List. In the event the Assessor shall determine that the percentage of work completed is not accurate, the Assessor shall withhold payment for work deemed not complete.

**3. Budget Limitations**

The Contract price shall be paid subject to the appropriation of necessary funds by the Town's fiscal authority. The Town shall not be liable to the Contractor for any cost in any fiscal year in excess of that year's annual appropriation.

**N. CHANGES AND SUBLETTING OF CONTRACT**

**1. Changes**

Changes in the specifications or to the Contract will be permitted only upon written mutual agreement of the Contractor and the Town.

**2. No Assignment**

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

**O. PENALTIES**

**1. Failure to Complete Revaluation**

The Town does not intend to seek an extension to complete its duties for the October 1, 2015 Grand List. Failure by the Contractor to complete all work as of the completion dates specified below, in a manner acceptable to the Assessor, shall be cause for a penalty payment by the Contractor of one thousand dollars (\$1500) per day beyond the following completion dates.

(i) As of October 9, 2015 the Contractor will deliver the completed CAMA database, integration of CAMA software with administrative software, video images and Assessor property record cards with all measurements, listings, sketches, pricing, suggested values.

(ii) As of December 30, 2015, the CAMA file will be updated with final assessments and all notices with the results of informal hearings will be completed and mailed out on forms approved by the Assessor.

## **2. Penalty Application**

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

## **P. CANCELLATION OR POSTPONEMENT OF REVALUATION**

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

## **IV. RESPONSIBILITIES OF THE TOWN**

### **A. NATURE OF SERVICE**

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

### **B. COOPERATION**

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

### **C. ITEMS FURNISHED BY THE TOWN**

The Town shall furnish the following to the Contractor:

#### **1. Office Space**

The Town will provide office space in Town Hall for the Contractor performing the Revaluation.

#### **2. Assessor Maps**

The Town will provide the Contractor with two (2) copies of the most up-to-date Assessor's maps available. In addition, the Town shall furnish the Contractor with copies of all property splits, mergers, and subdivisions.

The Contractor shall be responsible for updating and maintaining the maps in their possession with all new property splits, mergers and subdivisions.

### **3. Zoning**

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

### **4. Property Transfers**

The Town shall notify the Contractor on a regular basis of transfers and property splits occurring after the initial creation of the Revaluation database. The Contractor shall update the Revaluation database as necessary.

### **5. Administrative File**

At the commencement of the Revaluation project and at the request of the Contractor, the Town will provide a computer file containing ownership, location, deed references, mailing addresses, property identification numbers and assessment code information for each parcel on record.

### **6. Existing Field Cards**

The Town will allow the Contractor access to the existing field cards. The Contractor will be allowed to utilize the sketches, age built and other information contained in these records, at the discretion of the Assessor. The Contractor will make all copies of field cards needed during the Revaluation project.

### **7. Building Permits**

The Assessor shall make available to the Contractor on a timely basis all building permits or copies thereof issued during the course of the Revaluation from August 1, 2014 through October 1, 2015.

### **8. CAMA Software**

The Town is licensed to utilize the Vision Government Solutions Software (Version 6.4) of Vision Government Solutions of Northboro, Massachusetts. The Revaluation will be performed using this version software. Any costs related to the software support or licensing will be the responsibility of the Contractor. Contractor will be given access to the CAMA system. All data entry will be the responsibility of the Contractor. The Town will provide a terminal connection in the office for the Contractor. All required property characteristic information to be entered into the CAMA system is the responsibility of the Contractor.

### **9. Signing of Communications**

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

### **10. Income and Expense Forms**

The Assessor shall make available to the Contractor all copies of the Income and Expense information (Form M-58) received by the Town for the 2012, 2013, and 2014 fiscal years. All

information filed and furnished with the M-58 forms shall not be a public record and is not subject to the provisions of Section 1-200 (Freedom of Information) of the Connecticut General Statutes.

### **11. Mailing Address**

The Town shall make available through the Assessor's or Tax Collector's Office the current mailing address and other relative data that exists on the administrative program for all property owners.

## **V. RESPONSIBILITIES OF THE CONTRACTOR**

The Contractor is responsible for fulfilling the requirements stated in this RFP in a timely, professional and satisfactory manner. The Contractor shall use its best efforts to assist the Assessor in determining accurate and proper market calculations and shall not undervalue or overvalue any land, building or other property to avoid or minimize its responsibility as set forth herein. During the course of the Revaluation, the Contractor shall work cooperatively with the Assessor, and shall provide any reports, invoices, schedules and other information required by this RFP or requested by the Assessor.

### **A. PUBLIC RELATIONS**

The parties recognize that a good public relations program is required in order that the taxpayers of the Town may be informed as to the purpose, benefits and procedures of the Revaluation.

The Contractor shall provide assistance to the Assessor in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs, property owner groups and any Town of Westport Committees as a means of establishing understanding and support for the Revaluation program and sound assessment administration. The Contractor shall supply visual aids and other media at its disposal to this end. The Assessor shall approve all public releases. This program will commence prior to the data collection effort and continue on a regular basis for the duration of the project.

At a minimum, the following points will be addressed as often as possible: Significance of Property Tax; Necessity of Project; Purpose and methods of project equity; Role of Town; Role of Contractor; Role of Assessor; Cooperation of parcel owners is key to successful project; Necessity of Data Collectors; Caliber and training of data collectors; Need for data quality control; Full Disclosure aspect throughout project. At the request of the Assessor, the Contractor shall appear before all municipal public hearings of municipal bodies called to consider questions arising from or related to the Project.

### **B. CONDUCT OF COMPANY EMPLOYEES**

As a condition of this Contract, the Contractor's employees shall, at all times, treat the residents, employees and taxpayers of the Town with respect and courtesy. The Contractor shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision including immediate removal and replacement of the employee from the Westport revaluation.

## **C. PERIODIC STATUS REPORTS**

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

## **D. MEASURING AND INSPECTION OF REAL ESTATE**

### **1. Data Collection Criteria**

The Contractor shall ascertain from the Assessor those properties on which advance approval for inspection is to be obtained.

The Contractor's data collectors will have each Interior Inspection verified by having an owner, adult resident of the building, or a building manager sign and date the field card. Field cards will include the initials of the data collector and dates of any contact with the property owner. At no time shall any employee of the Contractor enter any structure which is solely occupied by a minor. A minor is defined as anyone less than 18 years old.

When the residence is solely occupied by a person that is at least 18 years, but not the owner, the employee of the Contractor will not enter the structure without first getting permission from the owner.

### **2. Inspections**

Inspection of the residential properties will proceed on a neighborhood by neighborhood basis. The delineation of these areas will be developed with the assistance and approval of the Assessor.

The Contractor must complete inspections of all Specified Properties. The Contractor shall make a careful and complete listing of physical construction details of all real property buildings and structures in the Town, (as specified by the Assessor) on proper forms for entry into the CAMA data base.

Details of all structural improvements are to be listed on the property record cards/street card. For property data quality assurance, a data collection manual, training for data collectors, and data entry edit procedures must be provided. In addition, the Assessor will provide the data collectors with a manual that will assist them in grading the quality of homes and identifying home styles. Grading homes by the data collectors will be mandatory for homes where access is gained.

The Contractor will verify or correct the complete listing of all physical details for all residential, commercial and industrial buildings and all structural improvements attached to each parcel. Listing will include all interior and exterior construction details, quality of construction, age and condition.



(i) Exterior Inspections

When measuring, all buildings and improvements shall be measured to the nearest foot. Six (6) inches or less shall be rounded down; seven (7) inches or more shall be rounded up to the nearest foot.

(ii) Interior Inspections

Interior inspections shall be complete. Information taken at the door is unacceptable. It shall be noted on the record card if the data collector is not allowed to view any portion of the property and the reason why.

(iii) Inspection Refusals

When entrance to a property is refused, the Contractor will report to the Assessor the names, addresses and reason for refusal. This information will be supplied to the Assessor during the bi-weekly meeting that will be held throughout the Revaluation. The Assessor shall review information and if he is unable to gain the cooperation of the party involved, he will notify the Contractor and the Contractor shall at their expense send a data mailer and/or sales verification mailer to the property.

The Contractor shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and on the basis of an estimate of the interior features and interior condition of the property. The Contractor shall make adequate notations of the lack of cooperation, and the manner of arriving at value, conspicuously on the property record card (field card). Criteria for Data Mailers and Sales Verification Mailers will be agreed upon between the Contractor and the Assessor.

(iv) Callbacks

The Contractor will make one callback to attempt to gain entry for an Interior Inspection. This callback will be on a weekday between 5:00p.m. and 7:30p.m. or on a Saturday. Dates and times of callbacks will be recorded on the field card.

(v) Notification

If after one callback there is no contact with the property owner, the Contractor will prepare notification letters that will be mailed to the owner of such properties. This notification letter will describe the unsuccessful effort to inspect the property, and will request that the property owner contact the Contractor to make arrangements for the inspection of their property within a prescribed timetable.

This notification letter will be mailed at the Contractor's expense via first class mail. These letters, together with a listing of the property owners who will receive the letters, will be delivered to the Assessor at the bi-weekly status meeting.

The Assessor will be notified of the names of property owners who fail to respond to the notification letter. The Assessor will make additional efforts to secure permission to allow for

the inspection of these properties. If permission to inspect this property is not received, this property will be treated as a refusal. Dates and results of notification letters will be recorded on the field card.

The Contractor must provide the Assessor with monthly status reports as to the percentage of Interior Inspections with signatures that have been obtained in relationship to the total number of properties that have been inspected.

(vi) Data Mailers

The Contractor, as a quality check, shall, at its own expense, prepare and send out to each residential property owner, including condominiums, a data mailer, setting forth the pertinent elements of the property. It will contain characteristics of the property to include style, exterior walls, story height, attic, age, basement type, basement living area, heating fuel type, heating system type, central air conditioning, total bedrooms, total full bathrooms, total half bathrooms, total number of rooms, fireplaces, year built, square footage, parcel size and zoning. The data mailers will be mailed after data collectors have inspected each section of the Town, and all data entry has been completed. Included with these data mailers will be a stamped, return-addressed envelope and a cover letter approved and signed by the Assessor, which explains the purpose and content of the mailer. In addition, the data mailer will contain the opportunity for the property owner to contact the Contractor and make arrangements for the inspection of their property within a prescribed period of time.

The Contractor shall mail, at the Contractor's expense by first class mail to all commercial property owners either a data mailer or a copy of their field card for their review along with a letter asking them to review the field card and to contact the contractor if there are any discrepancies. This field card will not contain any valuation information and will be for review purposes only. Included with these field cards will be a stamped, return-addressed envelope and a cover letter approved and signed by the Assessor, which explains the purpose and content of the mailer. In addition, the data mailer will contain the opportunity for the property owner to contact the Contractor and make arrangements for the inspection of their property within a prescribed period of time.

The Contractor must respond to all responses citing errors and correct all actual errors.

The Contractor shall re-inspect such properties as a result of the differences cited on the data mailers responses, and make changes accordingly not later than July 31, 2015.

### **3. Physical Details**

The Contractor will verify from Assessor's field cards, all physical details for all residential, commercial, tax exempt, public utility, special purpose and farm buildings, and all structural improvements attached to each parcel. It will include all interior and/or exterior construction details, quality of construction, age, condition, the percent of physical completion, economic and functional depreciation. All data will be recorded on property forms to be approved by the Assessor. The Assessor will accompany data collectors on initial inspections so that agreement can be reached on all construction details that affect value.

#### **4. Sketches**

The Assessor will allow the Contractor to use previous sketches. Care must be given to ensure that current sketch is accurate and, if not, a new sketch will be drawn. Sketches will be drawn to the nearest foot and labeled using the labeling procedures approved by the Assessor. If no sketch presently exists, the data collector shall notify the Assessor, perform a physical inspection of the property and sketch the improvements.

#### **5. Quality Control**

The Contractor shall be required to submit a detailed quality control plan to the Assessor to ensure the accuracy of the data collected as well as all data entry including, but not limited to, re-entry, spot checks, and error reports. This program must include a comprehensive reporting system for reporting this information to the Assessor.

Prior to field inspections, data collectors shall meet with the Assessor to discuss data collection criteria. The Assessor or inspection personnel from the Assessor's Office will accompany data collectors on initial inspections in an effort to agree upon factors that contribute to value.

During the course of the project, the Assessor may review selected random properties for consistent valuation. The Assessor may, at his discretion, change any value arrived at by the Contractor. In such instance, the Assessor shall note his initials on the record card as the reviewer.

### **E. FIELD CARDS**

Immediately at the conclusion of the Revaluation project (December 13, 2015), the Contractor shall supply to the Assessor, a final electronic property record card (commonly referred to as a "Field Card") for each taxable and non-taxable parcel. This set of field cards shall be available through the CAMA system. In addition, all preliminary or draft field cards produced during the Revaluation program shall be given to the Assessor in street and street number order.

#### **1. Necessary Field Card Information**

These cards shall contain all manner of information affecting value, including, but not limited to, address of the property, street code (location number), Assessor's map/lot identification, classification as to usage, owner of record as of October 1, 2015, source of title, size, shape, and physical characteristics of land, with breakdown of front feet, square feet, or acreage as applicable, along with unit of value applicable to each; public utilities available, public improvements, census tract number, zoning in effect as of assessment date, a breakdown of the assessed valuation as to categories prescribed by the Secretary of the Office of Policy and Management as adapted by the Assessor, a description of the style or type of building, and a sketch of all major buildings, with a listing of all the components of each building. The component listing shall include, but is not limited to, type of foundation, exterior walls, roof, roof type, floors, basement and attic information, interior finish, heat, plumbing, etc. For the cost approach, the buildings will also be valued on a square footage basis and, where pertinent, a separate value for each component.

## **F. BUILDING PERMITS**

The Contractor shall be responsible for the interior and exterior inspection and valuation relating to all building permits that are issued as of June 1, 2014 and completed as of October 1, 2015, with the exception of all new construction or additions and renovations with a permit construction cost estimate higher than \$250,000. These properties shall be inspected and data entered by personnel from the Assessor's office. In addition, all permits considered by the Assessor to be complete as of October 1, 2015, shall be inspected by the Contractor or personnel from the Assessor's office for assessment purposes.

The Contractor shall deliver to the Assessor, by October 9, 2015, a computer listing by property location for all property cards that have incomplete improvements as of October 1, 2015. Notations will be made on the property field cards explaining the improvement that is incomplete. The field card shall indicate the percentage of completion and reflect the percentage of completion in the valuation as of that date. The final inspection and review shall take into consideration any known or apparent changes in the individual property since it was first inspected in order that the final appraisal of property shall be as of October 1, 2015.

The collection of data and the resulting changes of valuation resulting from any demolition of structures occurring after the October 1, 2014 Grand List and including October 1, 2015 will be the responsibility of the Contractor.

## **G. MAINTENANCE OF RECORDS - TOWN PROPERTY**

The Contractor will maintain both the existing 2010 Revaluation CAMA file and the CAMA file being used for the 2015 Revaluation. Both files will be maintained with the most current information so that in the event that the 2015 Revaluation is not implemented, the Assessor can reinstitute the 2010 assessment information to be reflected in the 2015 Grand List.

The original or a copy of all records and computations, including machine readable databases, made by Contractor 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 Revaluation or termination of this Contract by the Town, shall be left in good order in the custody of the Assessor.

The Contractor will not modify the table structure or override individual property values. The assessed values to be determined shall be seventy (70) percent of the full fair market value as defined in Section 12-63 of the Connecticut General Statutes and shall be based on recognized methods of appraising and conform to USPAP (Uniform Standards of Appraisal Practice).

Such records and computations shall include but are not limited to: 1. Assessors Maps; 2. Land Value Maps; 3. Materials and Wages, Cost Investigations and Schedules; 4. Data Collection Forms, Listing Cards, Property Record Cards with property valuations and sketches; 5. Capitalization Rate Data; 6. Sales Data; 7. Depreciation Tables; 8. Computations of land and /or building values; 9. All letters of memoranda to individuals or groups explaining methods used in appraisals; 10. Operation statements of income properties; 11. Duplicate notice of valuation changes; and 12. Database of all property records, CAMA system, video imaging, and integration with administrative system.

## **H. ONSITE EQUIPMENT**

The Town shall maintain 2 computers within the office space provided. The Contractor shall provide such training as may be required to allow the Assessor access to the information on such information systems. The Contractor must provide any additional office equipment to include computers, printers, copiers, and locking cabinets, etc. It is mutually understood and agreed that access to the on-site systems shall be for the purpose of allowing the Assessor to monitor and check the work progress under the Contract. Such activities by the Assessor shall be conducted in such a manner as to not interfere with the ability of the Contractor to perform its duties under this Contract.

The Contractor is responsible for making backup copies of the database and storing the backups off-site. In the event that a data backup session needs to be restored, it is the Contractor's sole responsibility to restore the information and confirm its accuracy.

## **I. VIDEO IMAGING**

The Town currently maintains video images for all of the improved parcels in our database. Integrating visual images in the existing database within the CAMA system will be the responsibility of the Contractor. This database must have a video image of each parcel in the CAMA data file.

The Contractor will be responsible for providing new photographs for all of the Specified Properties and properties they are required to inspect. These photographs will be added to the existing database that includes properties that have already been inspected by the Assessor. The Assessor has the authority to randomly review the images provided by the Contractor and assess their quality.

## **J. ASSESSMENT NOTICES**

At the close of the Revaluation, a notice shall be sent, at the Contractor's expense (including envelope) by first class mail, to each property owner of record, setting forth the valuation that has been placed upon the property identified in the notice. The notice shall be prepared in duplicate, sent out by November 6, 2015 and in conformity with the Connecticut General Statutes, as from time to time amended. Further enclosed with such notice shall be a letter specifying the dates, times, and places of the revaluation company informal public hearings and an explanation as to the manner in which an appeal may be filed with the Board of Assessment Appeals. Such notices shall be subject to approval by the Assessor. A duplicate copy of all letters sent shall be arranged in alphabetical order and left with the Assessor. Where applicable, a letter shall be enclosed to explain the benefits of and the effect on the new assessment for properties classified as FARM, FOREST or OPEN SPACE. Prior to its mailing, the Assessor shall approve said letter.

## **K. INFORMAL PUBLIC HEARINGS**

(i) At a time mutually agreeable to the Assessor and the Contractor, but not later than November 20, 2015, the Contractor shall hold hearings so that owners of property or their legal representatives may appear at specified times to discuss their new assessments with qualified personnel of the Contractor's staff. "Qualified personnel" shall be defined as one who actually performed appraisal work for the project either as a Reviewer, Field Appraisal Supervisor or any such person involved in the actual estimating of value for the project or such person as approved by the Assessor.

In addition, the Assessor will contact owners of up to 60 commercial properties to conduct informal hearings for the purpose of discussing preliminary values. These discussions will be focused on providing the property owner with a summary of the valuation process, answering valuation questions, obtaining additional information from the owner, coming to an agreement as to the value of the property and enhancing public relations. The Assessor's Office will be responsible for mailing these notices to property owners and scheduling meetings with the representative from the Contractor and the Appraiser.

These informal hearings shall continue no longer than December 11, 2015. The Contractor shall provide a list of standards by which said hearings shall be conducted.

(ii) The Contractor shall maintain a (national) toll free line for the purpose of making appointments for the informal hearings and shall allow for appointments for the informal hearings to be made online. The Contractor, in conjunction with recommendations of the Assessor, shall schedule a sufficient number of hearings and provide sufficient personnel (a minimum of four) to handle said hearings expeditiously and fairly. A minimum of two personnel will be required if a Contractor's hearings pertain to the Revaluation of only the commercial properties. The Contractor's personnel shall explain the manner and methods of arriving at value in the terms best understood by the public. Any information offered by the taxpayer or representative shall be given consideration, and adjustments shall be made where warranted.

(iii) The Contractor shall have an adequate number of days for the hearings, said hearings to include evenings and Saturdays. Every property owner shall have the opportunity to an informal hearing with the Contractor within said period of time agreed upon by the Assessor and the Contractor. The Contractor must inspect any property that appears to contain an error that impacts value based on information provided at the hearing.

If the property (land and/or building) had not been inspected during the previous 2010 revaluation, the Contractor shall conduct an interior inspection prior to any reduction in value being made.

The Contractor shall also conduct an interior re-inspection of at least 5% of properties involved in the informal hearings which had been inspected since the previous 2010 Revaluation.

(iv) The Contractor must provide, at a minimum, the following information to the Assessor at the conclusion of the hearing:

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

(v) The Contractor shall mail a notice that reflects the result of the hearings at the Contractor's expense. Such notice shall include the original valuation determined by the Contractor and any adjusted valuation as deemed appropriate based on any information received at such hearing, or

a statement that no change was warranted. Such notice shall be subject to approval by the Assessor, and will be mailed no later than January 8, 2016.

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

#### **L. BOARD OF ASSESSMENT APPEALS**

The Contractor shall have the Field Appraisal Supervisor available for a 2-hour training session with the Board of Assessment Appeals prior to the Board's hearings on the 2015 Grand List.

The Contractor shall have a qualified member or members of its staff available for attendance at any deliberations of the Board of Assessment Appeals hearings to be held after the completion of the Revaluation (Sundays excluded). This staff member will assist the Board by explaining the valuation procedure and the information contained in the property files. The staff members will be appropriately qualified for deliberations of residential or commercial properties. Such availability and attendance shall not be required after the date, including any permitted extension, for the completion of the duties of the Board of Assessment Appeals on the October 1, 2015 Grand List.

#### **M. LITIGATION**

In the event of appeal to the courts, the Contractor shall furnish a competent witness or witnesses to defend the valuation of the properties appraised. It is understood that the Contractor shall furnish said witness or witnesses for each court action instituted on the October 1, 2015 Grand List assessments at no charge for 5 days of time expended for court appearances or preparation for court appearances.

The Contractor shall cooperate with the Town by providing assistance, any necessary documentation or narrative appraisal reports, to fully explain or defend valuations. The Contractor shall maintain accurate records of preparation time. That preparation time shall be subject to the reasonable control of the Town. After the initial 5 days, a per diem rate of \$900.00 or \$450.00 per half day will be charged. A single Per Diem is defined as eight (8) hours. If an action arises to revoke the Revaluation of the October 1, 2015 Grand List, the Contractor shall provide competent witnesses to defend the Revaluation at no cost to the Town.

#### **N. INFORMATION**

The Contractor shall give to the Assessor any and all information, including but not limited to, pricing schedules, hearing information, etc., pertaining to the Revaluation work for a period of two (2) years after completion of the duties of the Board of Assessment Appeals on the October 1, 2015 Grand List, without further cost to the Town.

#### **O. ASSESSOR'S OFFICE STAFF TRAINING PROGRAM**

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

## **P. TRANSMITTAL OF RECORDS TO THE ASSESSOR**

The Assessor shall be allowed access to review all appraisals prior to and after completion. The Contractor shall turnover all building appraisals, either completed or under construction and all completed and corrected records to the Assessor by December 30, 2015 as specified in the schedule and agreed upon by the Assessor. All documentation employed in conjunction with this project, including software programs, shall become the property of the Assessor. The final inspection and review shall take into consideration any known or apparent changes in the individual property since it was first inspected in order that the final appraisal of property shall be made as of October 1, 2015. This information and/or appraisal or record shall not be made public until after the informal hearings, except to the extent that public access may be compulsory under the provisions of applicable law.

## **VI. APPRAISAL SPECIFICATIONS**

The assessed values to be determined shall be seventy (70) percent of the full fair market value as defined in the Connecticut General Statutes and shall be based on recognized methods of appraising and conform to USPAP (Uniform Standards of Appraisal Practice), as required by Connecticut General Statutes for the licensing and certification of all individuals involved in the appraisal of real estate. Any proposed modifications to the valuation schedules must be reviewed and analyzed with the Assessor prior to generating the proposed values for field review.

The Contractor will calculate a value estimate for each parcel that will be comprised of land, building, outbuildings, and total value. The Contractor shall compute to the nearest 100 dollars (\$100.00) the value of all properties.

### **A. MARKET APPROACH**

The Contractor must describe in detail its particular methods for generating values with the market approach. The Comparative Sales Approach or a Statistical Modeling Approach are the two techniques to be considered. If a statistical modeling approach is employed, the Contractor must specify the techniques employed and the types of property that will be valued with these techniques. If the direct sales comparison method is employed, the Contractor in its proposal must describe all adjustment techniques.

#### **1. Sales verification**

The validity of all residential sales in the Town for the period of April 1, 2014 through October 1, 2015 shall be determined by the Contractor and the Assessor. For vacant land, commercial/industrial, and special residential properties (i.e. waterfront) the Contractor and the Assessor will validate sales for the period of October 1, 2013 through October 1, 2015.

The Contractor must develop a program for verifying sales from sources other than the real estate conveyance documents. The sources for such information will include mail questionnaires (sales verification sheets) and may include telephone or field interviews, and third party sources such as multiple listing agencies, real estate services, private appraisers or brokers, and financial



institutions. Prior to implementation the program for sales verification must be approved by the Assessor.

The Contractor will perform a Full Measure and List of at least 95% of all sold properties. Properties wherein the owner refuses an interior inspection will be excluded from the interior inspection requirement. The Contractor will verify all sales with the owner and code them as useable or non-useable. Useable sales are defined as “arms-length” transactions that do not include foreclosures, family sales, auction sales, estate sales, etc. Sample sales verification mailer should be included at the time proposal is made. The sales inspections of the commercial properties will be the conducted by the Contractor and the Appraiser. The Contractor will be in charge of coordinating these inspections with the Appraiser. The Contractor shall develop and provide the Assessor with written documentation for the sales verification effort.

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

## **B. BUILDING COST SCHEDULES**

### **1. General**

The Contractor shall prepare for usage in the project as hereinafter specified, building cost schedules. These schedules shall reflect the unit-in-place method based upon the square foot or cubic foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial, industrial, public utility and agricultural construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees and all other direct and indirect cost of construction. All finalized schedules shall be approved by the Assessor before adoption and usage by the Contractor.

### **2. Types of Cost Schedules**

#### **(i) Residential**

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

(ii) Commercial

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

(iii) Industrial and Special Structures

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

(iv) Farm

- a. Cost schedules for farm structures shall be in electronic format and shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to barns, shed, silos, milk houses, coops, etc.

(v) Depreciation Schedules

- a. Depreciation schedules or methods to be used in determining the amount of depreciation in electronic format 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 and shall be approved by the Assessor.

(vi) Schedule for Town

- a. The Contractor shall supply and leave for the Town three (3) copies of all of the above required building cost schedules and depreciation schedules for the Town's usage and one (1) in an electronic format. These shall be turned over to the Assessor upon approval of the schedules.

### **C. INCOME APPROACH**

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

Typical income and expense ratios shall be developed by the Contractor by property type and shall be approved by the Assessor.

Income and expense data gathered by the Town shall be utilized and verified by the Contractor for income producing and where appropriate, owner-occupied properties. The Contractor assisted by the Appraiser, subject to the approval of the Assessor, will handle the analysis of this data. Any income and expense data, including OPM form number M-58 with accompanying summary reports and rent schedules shall become property of the Town.

All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information) of the Connecticut General Statutes. The Contractor will be responsible for any data entry of income and expense data. From these returns and other data sources, such as field investigations and interviews, the Contractor will establish market or economic rent and expenses for income producing properties.

The Contractor assisted by the Appraiser shall also develop capitalization rates reflective of the Westport market environment by investigating sales and income data. Rates shall be established for the various classes of property and checked with bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been checked by the Assessor, the Contractor shall perform the income approach using both actual and economic income and expenses.

#### **D. LAND VALUATION**

The land values will be derived from market sales occurring from October 1, 2013 to October 1, 2015, land residual analysis, and/or the extraction method.

The Contractor will work in conjunction with the Assessor to set all land values. In the event any disagreement between the Assessor and the Contractor, the Assessor shall have the final decision confirming all land values and methods. When applicable, both the full value and the P.A. 490 value shall be calculated by the Contractor.

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

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

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

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

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

#### **E. NEIGHBORHOOD AND STREET DELINEATION**

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

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

#### **F. FIELD REVIEW**

All properties shall be reviewed in the field by Contractor's Reviewer and Appraisers. Properties shall be reviewed for classification, grade, depreciation and final value to assure that they are correlated to comparable properties.

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

The Assessor shall be notified of the dates of review and be entitled to accompany the Reviewer during this phase of the Revaluation. The Assessor shall be notified of the specific properties that have declined in value as a result of the field review.

#### **G. CERTIFICATION**

It is understood and agreed that the Revaluation of properties covered by this Contract shall exceed the standards as outlined in the Connecticut Performance Based Revaluation Standards and Certification of Revaluation (Connecticut General Statutes), and shall conform to the procedures and technical requirements of the Assessor. At least bi-weekly, the Contractor shall meet with the Assessor to discuss the progress and various other details of the project. The Assessor must certify that the values resulting from this project represent 70% of the fair market value pursuant to Section 12-63 of the Connecticut General Statutes.

# Appendix

## Appendix A - Respondent Proposal Form Agreement

PROJECT: REQUEST FOR PROPOSAL FOR THE REVALUATION OF ALL REAL PROPERTY LOCATED WITHIN THE TOWN OF WESTPORT, CT, TO INCLUDE AN "INSPECTION" OF ALL SPECIFIED PROPERTIES, EFFECTIVE OCTOBER 1, 2015.

The undersigned Respondent affirms and declares the following:

1. That Respondent has read the Request for Proposal ("RFP") and fully understands its intent and content and that this Proposal is executed by said Respondent with full knowledge and acceptance of the terms and conditions of the RFP.
2. That should this proposal be accepted in writing by the Town, said Respondent will furnish the services for which this Proposal is submitted at the price proposal and in compliance with the provisions of the Contract which is subject to the approval of the Board of Selectmen.
3. That all exceptions to the RFP enclosed herewith shall be delineated in a separate Addendum clearly marked as, "Addendum to Westport's Request for Proposal." Each "Addendum" shall itemize by each change or exception the additional cost associated with each change or exception.
4. The Respondent has submitted with its Proposal a bid bond or certified check in the amount of ten percent of the highest proposal amount.
5. The Respondent shall furnish to the Town a Performance Surety Bond in the amount of the Contract price, which bond shall be issued by a bonding company authorized to do such business in the State of Connecticut with a minimum A.M. Best Company rating of A+ or specifically approved by the Town of Westport. Said bond shall be in a form satisfactory to and approved by the Town Attorney. The performance bond shall be delivered to the Town for the attorney's review prior to the signing of the Contract within 14 days of award.
6. That the Respondent or their representative has visited the Town of Westport, is familiar with the geography, general character of housing and the commercial and industrial areas; has examined the quality and condition of the Assessor's records; and has met with the Assessor to make themselves knowledgeable of those matters and conditions in the Town of Westport which would influence this Proposal.
7. That all items, documents and information required to accompany this Proposal are enclosed herewith.
8. That the Respondent proposes to furnish the services and materials required to complete the Revaluation in accordance with the Contract for the total dollar amount of:



**Appendix B - RESPONDENT AND TOWN AGREEMENT (SPECIMEN)**

This Agreement, made this the \_\_\_\_\_ day of \_\_\_\_\_, 2014, by and between the Town of Westport, a municipal corporation, located in the County of Fairfield, State of Connecticut, hereinafter termed the Town, acting by and through its First Selectman, having been so duly authorized and \_\_\_\_\_ hereinafter termed the Contractor.

**WITNESSETH THAT:**

WHEREAS, the Town, through its Assessor, plans to undertake a revaluation of all real property located within the corporate limits of the Town, for the October 1, 2015 Grand List; and

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

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

**I. CONTRACT DOCUMENTS**

The Contract shall consist of this Agreement and the terms and conditions of the Request for Proposal number 14-749T, dated \_\_\_\_\_, 2014 ( a copy of which is attached hereto) including the Proposal Form Agreement and any Addendums thereto, all of which are made a part of the Contract with the same effect as though fully set forth herein.

Any conflict between the provisions of this Agreement and the RFP Response will be resolved in favor of the provision that provides for a higher standard of obligation by the Contractor.

**II. EMPLOYMENT OF CONTRACTOR/SCOPE OF WORK**

The Town hereby engages the Contractor and the Contractor hereby agrees to perform a Revaluation (as that term is defined herein) of all real property, residential and commercial, located within the corporate limits of the Town, and to perform all the services and furnish all the records, materials, forms, software and supplies required by and in complete accordance with the terms of this Contract. All such labor, records, materials, forms and supplies to comply with the requirements of the pertinent Connecticut General Statutes and Special Acts, rulings of the Secretary of Office of Policy and Management, ordinances of the Town, and decisions of the courts.

### **III. COMMENCEMENT AND COMPLETION DATES**

The Contractor agrees to commence the work no later than two weeks after the signing of the Contract (or such time as is otherwise agreed to by the Assessor) and shall adhere to the Completion Date and Time Schedule for completion of the Revaluation as set forth in Section III (L) of the General Conditions. **The parties acknowledge that TIME IS OF THE ESSENCE in connection with the performance of work and the delivery of records, materials, forms and supplies by Contractor.**

### **IV. COMPENSATION/PAYMENT SCHEDULE**

The Town agrees to pay the Contractor the total sum of \$ \_\_\_\_\_ as compensation for the Contractor's services to be performed and the records, materials, forms, reports and supplies to be furnished by the Contractor. The Town shall pay such compensation subject to the conditions set forth in the Contract and in accordance with the Payment Schedule set forth in Section III, Paragraph M, of the General Conditions.

### **V. TRANSFER, ASSIGNMENT AND SUBLETTING OF CONTRACT**

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

Nothing contained in this Contract shall be deemed to create any contractual relationship between any subcontractor and the Town.

### **VI. INDEPENDENT CONTRACTOR**

It is expressly agreed and understood that Contractor shall at all times act strictly and exclusively as an independent contractor and shall not be considered under the provisions of this Contract or otherwise as having any employee status with the Town, or as being entitled to participate in or receive any benefit under any benefit plan or program made available by the Town to its employees. Contractor hereby irrevocably waives the right to accrue benefits under any such plan or program even in the event Contractor is subsequently reclassified by any court or governmental authority as eligible for such participation. Contractor is not granted any right or authority to assume or create any obligation or responsibility, express or implied, on behalf of or in the name of the Town, or to bind the Town to any agreement, contract or arrangement of any nature, except as expressly provided herein. Contractor shall be solely and entirely responsible for Contractor's acts during the performance of this Contract.



## **VII. FEDERAL, STATE AND LOCAL LAWS**

All applicable Federal, State and local laws, rules and regulations of all authorities having jurisdiction over the Revaluation project shall apply to the Contract throughout and are deemed to be included herein. Contractor shall also comply with all applicable local, State and Federal anti-discrimination laws, rules and regulations and requirements thereof.

## **VIII. TERMINATION**

The Town may terminate this Contract for the following reasons:

1. If the Contractor fails to perform its obligations under this Contract in accordance with its terms or if the Town reasonably doubts that the Contractor's work is progressing in such a manner as to ensure compliance with the Completion Dates and Time Schedule set forth in Section(III), Paragraph (L), the Town shall have the right, in addition to all other remedies it may have, upon seven (7) days written notice to the Contractor and its surety bonding company, to declare the Contract in default and thereby terminated, and to award the Revaluation project or the remaining work thereof, to another contractor.
2. In the event the Representative Town Meeting ceases to provide funds for the continuation of payments hereunder, the Contract shall terminate within thirty (30) days of written notice to the Contractor without any further obligation on the part of the Town. In the event of such termination, the Contractor shall be compensated for work performed to the date of such termination.
3. If the Contractor does not pay its debts as they shall become due, or if a receiver shall be appointed for its business or its assets and not voided within thirty (30) days, or if the Contractor shall make an assignment for the benefit of creditors, or otherwise, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt then and forthwith thereafter, the Town shall have the right, at its option and without prejudice to its right, hereunder to terminate this Contract and withhold any payments due.
4. Upon seven (7) days notice in the event any material representation or warranty of the Contractor shall be untrue.
5. Upon termination the Contractor's agents and employees shall, at the Assessor's direction, vacate in an orderly fashion the office space provided by the Town, leaving behind all records, properly filed and indexed, as well as other property of the Town. Any funds held by the Town under the Contract shall become the property of the Town to the extent necessary to reimburse the Town for its costs in obtaining another contractor and supervising the transition. Termination of the Contract and retention of funds by the Town shall not preclude the Town from bringing an action against the Contractor for damages or exercising any other legal, equitable, or contractual rights the Town may possess in the event of the Contractor's failure to perform.

## IX. REPRESENTATIONS AND WARRANTIES OF THE CONTRACTOR

The Contractor represents, warrants and covenants to the TOWN as follows:

1. Organization, Powers and Qualifications. Contractor is a corporation duly organized, validly existing and in good standing under the laws of the State of \_\_\_\_\_; it has all requisite corporate power and authority to own its properties and assets and carry on its business as now conducted
2. Experience in Revaluation and Appraisal of Real Property. Contractor is experienced and qualified to carry on the work of appraising real property, including but not limited to residential and commercial real property, in municipalities similar to Westport and a substantial portion of its business activities have been related to such work. Contractor is familiar with recognized Connecticut appraisal practices and with the standards required for determining ad valorem values of all forms of real property, including but not limited to residential and commercial real property for assessment purposes. It has successfully conducted town-wide revaluations of all forms of real property in the State of Connecticut in municipalities similar to Westport and is adequately staffed with qualified individuals to fulfill its obligations under the terms of this Contract.
3. Due Execution. This Agreement and the other agreements and instruments to be executed and delivered by Contractor pursuant hereto have been duly executed and delivered by Contractor and constitute valid and binding obligations of Contractor enforceable in accordance with their respective terms, except as the enforceability hereof or thereof may be limited by bankruptcy, insolvency or similar laws affecting creditors' rights generally or by general principles of equity (whether considered in a suit at law or in equity).
4. Conflict with Other Agreements, Approvals. The execution, delivery, and performance of this Agreement by Contractor does not (a) violate any applicable provision of any law, statute, rule or regulation or any judgment, order, injunction, decree or ruling of any court or governmental authority applicable to Contractor (b) violate or conflict with, or permit the cancellation of, or constitute a default under, any contract to which Contractor is a party, or (c) require any consent, approval or authorization of, or notice to, or declaration, filing or registration with, any governmental authority or other third party.
5. Compliance with Law. Contractor and its use and occupancy of its assets and properties wherever located is and has been in compliance in all material respects with all applicable laws, regulations, judgments, orders and other requirements of all courts, administrative agencies, or governmental authorities, foreign or domestic, having jurisdiction over the Contractor or its properties and has not received any claim or notice of violation with respect thereto.

6. Licenses. Contractor owns or possesses all certifications, licenses, certificates, permits, consents, approvals, waivers, and all authorizations, governmental or otherwise, required for the conduct of its business as now conducted and proposed to be conducted (the "Licenses"). All such Licenses are valid and in effect. Contractor is not in violation of any License, nor has it received any notice of any claim, violation, proceeding or threatened proceeding relating to any such License or claimed lack of any necessary License. Neither the execution nor delivery of this Agreement nor the consummation of the transactions contemplated hereby will have a materially adverse effect upon or with respect to any License.
  
7. Litigation. (a) No claim, action, suit, arbitration, investigation or other proceeding is pending, or, to Contractor's best knowledge, threatened, against it before any court, governmental agency, authority or commission, arbitrator or "impartial mediator" and there are no facts or events or occurrences by reason of which any such action or proceeding may be brought; (b) there are no judgments, consent decrees, injunctions, or any other judicial or administrative mandates outstanding against Contractor which materially and adversely affect its ability to perform its obligations under this Contract and (c) no litigation has been brought or, Contractor's best knowledge, threatened respecting the transactions contemplated by this Agreement or the RFP Response.
  
8. Disclosure. No representation or warranty made by Contractor in this Contract contains or will contain any untrue statement of material fact or omits or will omit to state any material fact necessary to make the statements contained herein or therein not misleading. There is no fact known to Contractor which presently materially and adversely its ability to perform its obligations under this Contract which has not been disclosed to the Town.

## **X. MISCELLANEOUS**

1. Notices. Any notices or demands required or permitted by law, or by any provision of this Agreement shall be in writing, and may be delivered personally, by reputable private delivery service, or by the United States mail, registered or certified, return receipt requested and postage prepaid. If to the Contractor, notices should be addressed to \_\_\_\_\_ Attn: \_\_\_\_\_. If to the Town, notices should be addressed to Town of Westport, Attn: First Selectman, 110 Myrtle Avenue, Westport, CT 06880 with a copy to Town Assessor, 110 Myrtle Avenue, Westport, CT 06880. Notices shall be effective when delivery is made during regular business hours.
2. Governing Law. This Agreement shall be interpreted and enforced according to the laws of the State of Connecticut.
3. Successors; Third Party Beneficiaries. This Agreement shall be binding upon and inure solely to the benefit of the parties and their heirs, successors and permitted assigns, and

nothing herein, express or implied, is intended to or shall confer upon any other person any legal or equitable right, benefit or remedy of any nature whatsoever.

- 4. Waiver. No waiver of any provisions of this Agreement shall be effective unless made in writing and signed by the waiving party. No waiver of any provision of this Agreement shall constitute a waiver of any prior, concurrent or subsequent breach of the same or any other provisions hereof.
- 5. Severability. If any provision of this Agreement or the application thereof becomes or is declared by a court of competent jurisdiction to be illegal, void or unenforceable, the remainder of this Agreement shall continue in full force and effect, and the parties shall use best efforts to replace such void or unenforceable provision of this Agreement with a valid and enforceable provision that will achieve, to the extent possible, the economic, business and other purposes of such void or unenforceable provision.
- 6. Entire Agreement; Amendment. This Contract, contains the complete and exclusive statement of the agreements and understandings of the parties, and supersede all prior agreements, understandings, communications or proposals, oral or written, relating to the subject matter of this Agreement. This Contract may not be amended or modified except by written instrument duly executed by the parties.
- 7. Interpretation. The terms and provisions of this Contract shall be construed fairly in accordance with their plain meaning, regardless of which party was responsible for the drafting of such terms and provisions.

IN WITNESS HEREOF The Town of Westport and \_\_\_\_\_ have executed this Contract on the date first written above.

**IN THE PRESENCE OF:**

**TOWN OF WESTPORT**

\_\_\_\_\_

By: \_\_\_\_\_

James S. Marpe  
First Selectman

\_\_\_\_\_

By: \_\_\_\_\_

Contractor

\_\_\_\_\_

**Appendix C - Contractor Non-Collusion Agreement**

The Respondent submitting this proposal for the Revaluation certifies that:

1. The Proposal has been arrived by the Respondent independently and has been submitted without collusion with and without any agreement, understanding or planned common course of action with any other contractor or competitor.
  
2. The contents of the proposal have not been communicated by the respondent or its employees or agents to any person not an employee or agent of the respondent or its surety on any bond furnished with the proposal and will not be communicated to any such person prior to the official opening of the proposal.
  
3. No attempt has been made or will be made by the Respondent to induce any other person, partnership or corporation to submit or not submit a proposal for purposes of restricting competition.

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

FIRM NAME OF  
RESPONDENT: \_\_\_\_\_

BY:  
SIGNATURE: \_\_\_\_\_

TYPE NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

## Westport RFP #14-749T Questions

1. Is it possibly to get a detailed parcel breakdown by Classification?

Classification I are all single family residential properties under 4500 square feet and approximately 540 condominiums. As stated in the "DEFINITIONS", the majority of Classification II will include residential single family properties above 4500 square feet in size as well as 375 commercial properties.

2. Is the Penalty amount \$1,000 or \$1,500?

\$1,500

3. What is the scope of the 600 vacant parcel inspections?

The inspection of the vacant land will require an onsite viewing of the parcels when physically possible in order to consider the factors that influence value as defined in Section VI, paragraph D.

4. Option 2

Is there a total of 2300 parcels including both the Classification II and Condominium that require a "Full" inspection?

Yes. This would also include approximately 375 commercial properties.

What is the parcel count of the Classification I that require a "modified" inspection?

There are approximately 5790 parcels that would require a "modified" inspection.

5. Data Mailers

Will the vendor only be responsible for mailers to properties which the vendor inspected?

Yes

If sent to all properties, who is responsible for data discrepancies in properties not inspected by the vendor?

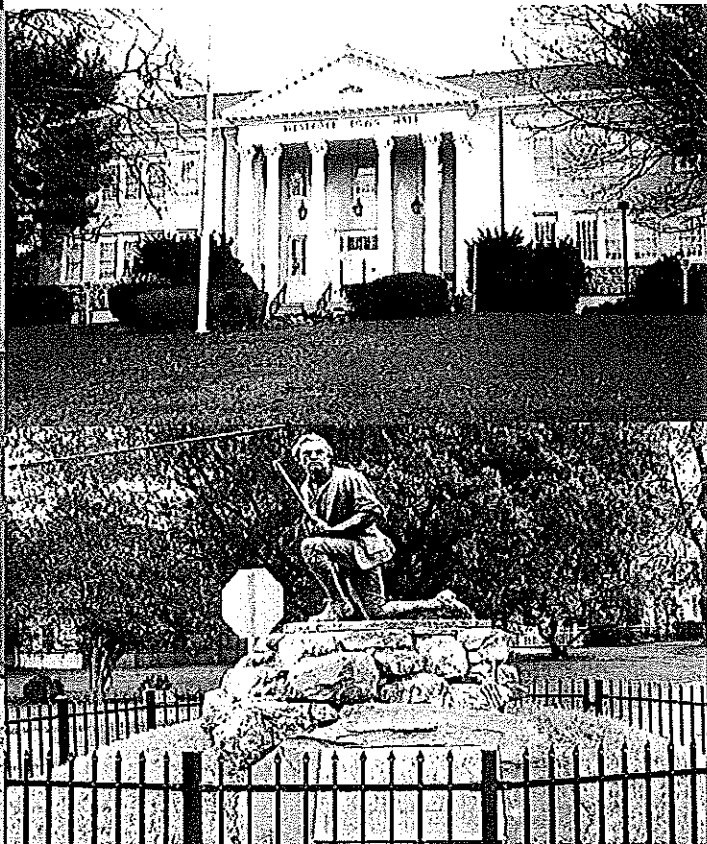
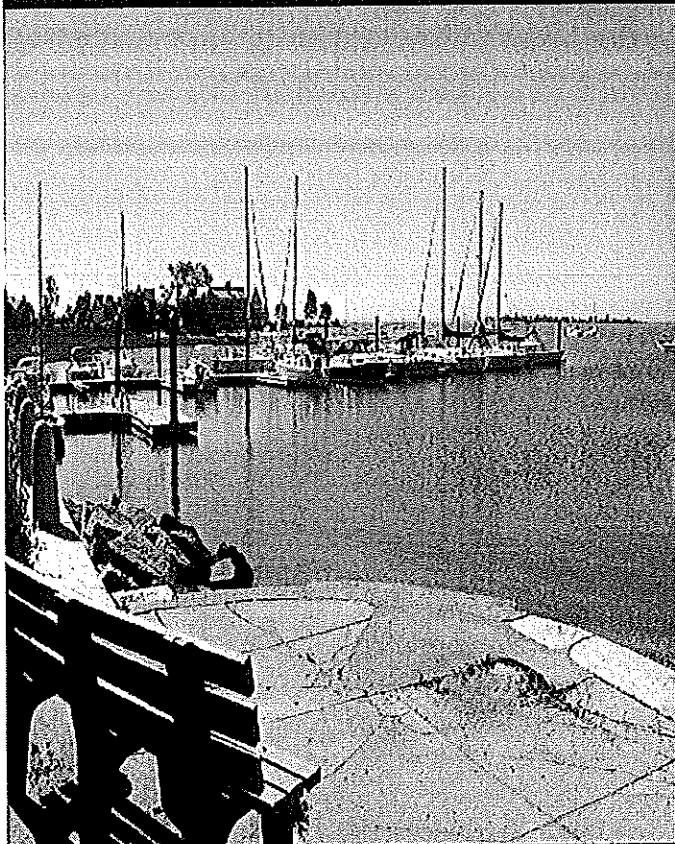
The vendor (Contractor).

What level of discrepancy will warrant a re-inspection? Example: If the vendor performs an interior inspection only and there is an issue with building square footage, who is responsible?

Discrepancies that effect value will require the vendor (Contractor) to re-inspect the property.

**WESTPORT**

**CONNECTICUT**



*Submitted by:*

Jay Taranto of Vision Government Solutions, Inc.  
44 Bearfoot Road  
Northboro, MA 01532  
Phone: 800-628-1013 ext. 3605  
Fax: 508-351-3798  
jtaranto@vgsi.com

**RESPONSE TO THE REQUEST FOR PROPOSALS FOR  
RFP 14-749T Assessor Revaluation Proposal**

 **VISION**  
GOVERNMENT SOLUTIONS

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 VISION  
GOVERNMENT SOLUTIONS

June 9, 2014

Mr. Richard Kotchko  
Purchasing Officer  
110 Myrtle Avenue  
Room 313  
Westport, CT 06880

Dear Mr. Kotchko:

Vision Government Solutions is pleased to propose Revaluation Services to the Town of Westport in response to your Requests for Proposals. We have been in the Revaluation and Municipal software business for over 30 years, and have both the personnel and financial resources to complete your project professionally and on schedule. We also have a high degree of experience with the Connecticut real estate market having completed over 50 Valuation Projects over the last three years. We plan to work alongside the Town in order to help you to complete your Revaluation project.

We plan to use and support your existing *Appraisal Vision* CAMA software as part of the project. Our prices are based on the parcel counts in the Request for Proposals. This price includes all of the resources specified in the RFP. We will also provide Public Relations throughout the project. We will involve the Town in all aspects of the revaluation and provide detailed updates throughout the entire project. We have enclosed sample PR documents that we have found beneficial in other successful projects, which can be used in keeping an open line of communication with the public.

We are proposing Dave Arnold as the Project Director and Sue Robinson as the Project Supervisor. Dave has been managing revaluation projects for over 25 years and Sue has been managing for over 10 years, specializing in residential properties in Connecticut. On Commercial properties, Mike Tarello MAI, will be the lead appraiser and will work with the independent appraiser hired by the Town to assist with the Commercial valuation. We are proposing Steve Ferreira to lead the waterfront valuation and analysis. Steve has extensive experience in mass appraisal, valuing waterfront in Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island, and Vermont on more than 200 projects, since 1975.

Vision has a reputation in providing outstanding services and client support. In fact, more than fifty percent of our clients have been clients for twenty plus years. We will be there for you through the duration of the project, and beyond, to assist you.

We realize Towns are faced with budgetary constraints. Therefore, we have offered optional cost savings items. We feel these options do not jeopardize or sacrifice the accuracy or integrity of your revaluation project. We have made efforts to utilize newer technologies in order to pass on cost savings and hope you consider them as part of your revaluation project.

 VISION  
GOVERNMENT SOLUTIONS

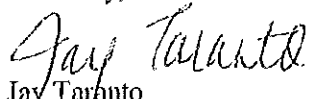
We thank you in advance for your consideration.

The primary contact for this proposal is:

Patrick Donovan  
Regional Sales Manager  
Vision Government Solutions, Inc.  
44 Bearfoot Road  
Northboro, MA 01532  
800-628-1013, ext. 3644  
pdonovan@vgsi.com

This offer is good for 90 days.

Sincerely,

  
Jay Taranto  
Executive Vice President

## Westport RFP #14-749T Questions

1. Is it possible to get a detailed parcel breakdown by Classification?

Classification I are all single family residential properties under 4500 square feet and approximately 540 condominiums. As stated in the "DEFINITIONS", the majority of Classification II will include residential single family properties above 4500 square feet in size as well as 375 commercial properties.

2. Is the Penalty amount \$1,000 or \$1,500?

\$1,500

3. What is the scope of the 600 vacant parcel inspections?

The inspection of the vacant land will require an onsite viewing of the parcels when physically possible in order to consider the factors that influence value as defined in Section VI, paragraph D.

4. Option 2

Is there a total of 2300 parcels including both the Classification II and Condominium that require a "Full" inspection?

Yes. This would also include approximately 375 commercial properties.

What is the parcel count of the Classification I that require a "modified" inspection?

There are approximately 5790 parcels that would require a "modified" inspection.

5. Data Mailers

Will the vendor only be responsible for mailers to properties which the vendor inspected?

Yes

If sent to all properties, who is responsible for data discrepancies in properties not inspected by the vendor?

The vendor (Contractor).

What level of discrepancy will warrant a re-inspection? Example: If the vendor performs an interior inspection only and there is an issue with building square footage, who is responsible?

Discrepancies that effect value will require the vendor (Contractor) to re-inspect the property.

# AIA Document A310™ - 2010

## Bid Bond

**CONTRACTOR:**  
*(Name, legal status and address)*  
 Vision Government Solutions, Inc.  
 44 Bearfoot Road  
 Northborough, MA 01532

**SURETY:**  
*(Name, legal status and principal place of business)*  
 The Hanover Insurance Company  
 440 Lincoln Street  
 Worcester, MA 01605

**OWNER:**  
*(Name, legal status and address)* Town of Westport, Purchasing Office  
 110 Myrtle Avenue, Room 313  
 Westport, CT 06880

**BOND AMOUNT:** Ten percent (10%) of the enclosed bid

**PROJECT:**  
*(Name, location or address, and Project number, if any)*

Revaluation of all Real Property

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

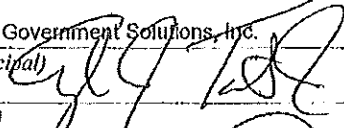
The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

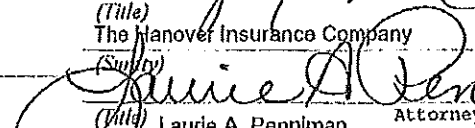
If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

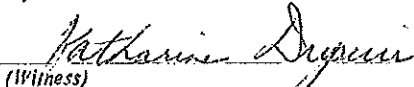
When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

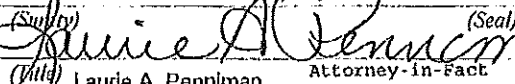
Signed and sealed this 9th day of June, 2014

  
*(Witness)*

Vision Government Solutions, Inc.  
*(Principal)*  *(Seal)*

The Hanover Insurance Company  
*(Surety)*  *(Seal)*

  
*(Witness)*

 *(Seal)*  
 Laurie A. Penniman  
 Attorney-in-Fact

**CAUTION:** You should sign an original AIA Contract Document, on which this text appears in RED. An original signature that changes will not be obscured.

Init.

THE HANOVER INSURANCE COMPANY  
MASSACHUSETTS BAY INSURANCE COMPANY  
CITIZENS INSURANCE COMPANY OF AMERICA

POWERS OF ATTORNEY  
CERTIFIED COPY

KNOW ALL MEN BY THESE PRESENTS: That THE HANOVER INSURANCE COMPANY and MASSACHUSETTS BAY INSURANCE COMPANY, both being corporations organized and existing under the laws of the State of New Hampshire, and CITIZENS INSURANCE COMPANY OF AMERICA, a corporation organized and existing under the laws of the State of Michigan, do hereby constitute and appoint

Joseph B. Battaini, John J. Cahill, John W. Kurkulonis, Jr., Darlene F. Beshaw, Laurie A. Penniman and/or James P. Wentzell

of Worcester, MA and each is a true and lawful Attorney(s)-in-fact to sign, execute, seal, acknowledge and deliver for, and on its behalf, and as its act and deed any place within the United States, or, if the following line be filled in, only within the area therein designated any and all bonds, recognizances, undertakings, contracts of indemnity or other writings obligatory in the nature thereof, as follows:

Any such obligations in the United States, not to exceed Twenty Million and No/100 (\$20,000,000) in any single instance

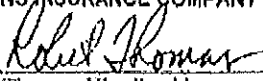
and said companies hereby ratify and confirm all and whatsoever said Attorney(s)-in-fact may lawfully do in the premises by virtue of these presents. These appointments are made under and by authority of the following Resolution passed by the Board of Directors of said Companies which resolutions are still in effect:

"RESOLVED, That the President or any Vice President, in conjunction with any Vice President, be and they are hereby authorized and empowered to appoint Attorneys-in-fact of the Company, in its name and as its acts, to execute and acknowledge for and on its behalf as Surety any and all bonds, recognizances, contracts of indemnity, waivers of citation and all other writings obligatory in the nature thereof, with power to attach thereto the seal of the Company. Any such writings so executed by such Attorneys-in-fact shall be as binding upon the Company as if they had been duly executed and acknowledged by the regularly elected officers of the Company in their own proper persons." (Adopted October 7, 1981 - The Hanover Insurance Company; Adopted April 14, 1982 - Massachusetts Bay Insurance Company; Adopted September 7, 2001 - Citizens Insurance Company of America)

IN WITNESS WHEREOF, THE HANOVER INSURANCE COMPANY, MASSACHUSETTS BAY INSURANCE COMPANY and CITIZENS INSURANCE COMPANY OF AMERICA have caused these presents to be sealed with their respective corporate seals, duly attested by two Vice Presidents, this 10th day of June 2013.



THE HANOVER INSURANCE COMPANY  
MASSACHUSETTS BAY INSURANCE COMPANY  
CITIZENS INSURANCE COMPANY OF AMERICA

  
Robert Thomas, Vice President

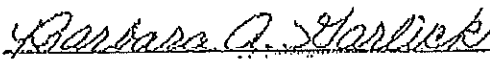
  
Joe Brenstrom, Vice President

THE COMMONWEALTH OF MASSACHUSETTS }  
COUNTY OF WORCESTER } ss.

On this 10th day of June 2013 before me came the above named Vice Presidents of The Hanover Insurance Company, Massachusetts Bay Insurance Company and Citizens Insurance Company of America, to me personally known to be the individuals and officers described herein, and acknowledged that the seals affixed to the preceding instrument are the corporate seals of The Hanover Insurance Company, Massachusetts Bay Insurance Company and Citizens Insurance Company of America, respectively, and that the said corporate seals and their signatures as officers were duly affixed and subscribed to said instrument by the authority and direction of said Corporations.



BARBARA A. GARLICK  
Notary Public  
Commonwealth of Massachusetts  
My Commission Expires Sept. 21, 2018

  
Barbara A. Garlick, Notary Public  
My Commission Expires September 21, 2018

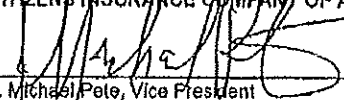
I, the undersigned Vice President of The Hanover Insurance Company, Massachusetts Bay Insurance Company and Citizens Insurance Company of America, hereby certify that the above and foregoing is a full, true and correct copy of the Original Power of Attorney issued by said Companies, and do hereby further certify that the said Powers of Attorney are still in force and effect.

This Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of The Hanover Insurance Company, Massachusetts Bay Insurance Company and Citizens Insurance Company of America.

"RESOLVED, That any and all Powers of Attorney and Certified Copies of such Powers of Attorney and certification in respect thereto, granted and executed by the President or any Vice President in conjunction with any Vice President of the Company, shall be binding on the Company to the same extent as if all signatures therein were manually affixed, even though one or more of any such signatures thereon may be facsimile." (Adopted October 7, 1981 - The Hanover Insurance Company; Adopted April 14, 1982 - Massachusetts Bay Insurance Company; Adopted September 7, 2001 - Citizens Insurance Company of America)

GIVEN under my hand and the seals of said Companies, at Worcester, Massachusetts, this 9th day of June 20 14.

THE HANOVER INSURANCE COMPANY  
MASSACHUSETTS BAY INSURANCE COMPANY  
CITIZENS INSURANCE COMPANY OF AMERICA

  
J. Michael Pete, Vice President

# Appendix

## Appendix A - Respondent Proposal Form Agreement

PROJECT: REQUEST FOR PROPOSAL FOR THE REVALUATION OF ALL REAL PROPERTY LOCATED WITHIN THE TOWN OF WESTPORT, CT, TO INCLUDE AN "INSPECTION" OF ALL SPECIFIED PROPERTIES, EFFECTIVE OCTOBER 1, 2015.

The undersigned Respondent affirms and declares the following:

1. That Respondent has read the Request for Proposal ("RFP") and fully understands its intent and content and that this Proposal is executed by said Respondent with full knowledge and acceptance of the terms and conditions of the RFP.
2. That should this proposal be accepted in writing by the Town, said Respondent will furnish the services for which this Proposal is submitted at the price proposal and in compliance with the provisions of the Contract which is subject to the approval of the Board of Selectmen.
3. That all exceptions to the RFP enclosed herewith shall be delineated in a separate Addendum clearly marked as, "Addendum to Westport's Request for Proposal." Each "Addendum" shall itemize by each change or exception the additional cost associated with each change or exception.
4. The Respondent has submitted with its Proposal a bid bond or certified check in the amount of ten percent of the highest proposal amount.
5. The Respondent shall furnish to the Town a Performance Surety Bond in the amount of the Contract price, which bond shall be issued by a bonding company authorized to do such business in the State of Connecticut with a minimum A.M. Best Company rating of A+ or specifically approved by the Town of Westport. Said bond shall be in a form satisfactory to and approved by the Town Attorney. The performance bond shall be delivered to the Town for the attorney's review prior to the signing of the Contract within 14 days of award.
6. That the Respondent or their representative has visited the Town of Westport, is familiar with the geography, general character of housing and the commercial and industrial areas; has examined the quality and condition of the Assessor's records; and has met with the Assessor to make themselves knowledgeable of those matters and conditions in the Town of Westport which would influence this Proposal.
7. That all items, documents and information required to accompany this Proposal are enclosed herewith.
8. That the Respondent proposes to furnish the services and materials required to complete the Revaluation in accordance with the Contract for the total dollar amount of:



Appendix C - Contractor Non-Collusion Agreement

The Respondent submitting this proposal for the Revaluation certifies that:

1. The Proposal has been arrived by the Respondent independently and has been submitted without collusion with and without any agreement, understanding or planned common course of action with any other contractor or competitor.
  
2. The contents of the proposal have not been communicated by the respondent or its employees or agents to any person not an employee or agent of the respondent or its surety on any bond furnished with the proposal and will not be communicated to any such person prior to the official opening of the proposal.
  
3. No attempt has been made or will be made by the Respondent to induce any other person, partnership or corporation to submit or not submit a proposal for purposes of restricting competition.

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

FIRM NAME OF

RESPONDENT: Vision Government Solutions

BY:

SIGNATURE: Jay Taranto

TYPE NAME: Jay Taranto

TITLE: Executive Vice President

DATE: June 9, 2014





## CLARIFICATIONS TOWN OF WESTPORT, CONNECTICUT

1. Vision has not been party to any lawsuits by any government entity in the last three years for which we have performed services.
2. **Litigation:** Five Litigation days, Litigation preparation or any days spent outside of Assisting with BOA have been included as part of our proposal, additional days will be billed at the rate of Nine Hundred Dollars (\$900) per Diem or Four Hundred Fifty Dollars (\$450) per half day.
3. **Data Mailers:** Our proposal includes a cover letter, data mailer, and self-addressed stamped envelope requesting that the property owners take part in the revaluation project by reviewing and submitting any data changes, and then mail the letter back.

\*\*As a cost saving option of approximately \$6,000, the letter can include a property owner unique id and link to the Vision Government Solutions web site, in lieu of a self-addressed stamped envelope. From this link, property owners can review their data and submit edits on-line. Vision staff would then have the ability to track and review all changes and either accept or reject these changes.

4. **Data Mailer On-site Inspections:** In an effort not to inflate our proposal costs and charge the Town for services that may not be rendered, we have included 200 on-site residential data collection inspections as part of our proposal for the purposes of the Data Mailer discrepancies. Any additional inspections over 200 will be charged at a rate of \$25 per parcel.

We realize Towns are faced with budgetary constraints and therefore have offered in the best interest of the Town optional cost savings items. We feel these options do not jeopardize or sacrifice the accuracy or integrity of your revaluation project. We have made efforts to utilize newer technologies in order to pass on cost savings and hope you consider them as part of your revaluation project.

STATE OF CONNECTICUT

Certificate No: 30

Expiration Date: March 31, 2018

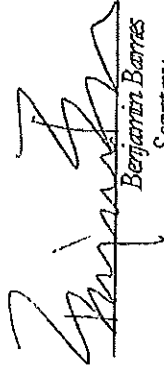
SECRETARY OF OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division  
*be it known that*


**Vision Government Solutions, Inc.**

*having met the necessary requirements and regulations  
is hereby designated as a Certified Revaluation Company  
To Perform*

**Real Property Value Estimations  
Personal Property Value Estimations**

*in witness thereof, this certificate is issued by:*

  
Benjamin Barres  
Secretary


  
W. David LeVasseur  
Acting Undersecretary

**VISION**  
GOVERNMENT SOLUTIONS

**NON-COLLUSION/TAX COMPLIANCE**

Pursuant to Massachusetts General Laws, Chapter 62C, Section 49A, I certify under the penalties of perjury that Vision Government Solutions, to the best of my knowledge and belief, has filed all Massachusetts State Tax Returns and paid all Massachusetts State Taxes required under law.

FEDERAL IDENTIFICATION: 04-2867314

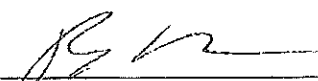
  
\_\_\_\_\_  
Brian McDonald, President

Vision Government Solutions affirms that:

- A. The proposed contract price has been arrived at independently, without collusion, consultation or communication as to any other contractor or with any competitor.
- B. The said price was not disclosed by Vision and was not knowingly discussed prior to the submission, directly or indirectly, to any other contractor or to any competitor.
- C. No attempt was made by Vision to induce any other person, partnership or corporation to submit or not to submit a proposal for the purpose of restricting competition.

The undersigned certifies under penalties of perjury that this agreement is, in all respects, bona fide, fair and made without collusion or fraud with any other person. As used in this section, the word "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

Vision Government Solutions

  
\_\_\_\_\_  
Brian McDonald, President

## **P. TRANSMITTAL OF RECORDS TO THE ASSESSOR**

The Assessor shall be allowed access to review all appraisals prior to and after completion. The Contractor shall turnover all building appraisals, either completed or under construction and all completed and corrected records to the Assessor by December 30, 2015 as specified in the schedule and agreed upon by the Assessor. All documentation employed in conjunction with this project, including software programs, shall become the property of the Assessor. The final inspection and review shall take into consideration any known or apparent changes in the individual property since it was first inspected in order that the final appraisal of property shall be made as of October 1, 2015. This information and/or appraisal or record shall not be made public until after the informal hearings, except to the extent that public access may be compulsory under the provisions of applicable law.

## **VI. APPRAISAL SPECIFICATIONS**

The assessed values to be determined shall be seventy (70) percent of the full fair market value as defined in the Connecticut General Statutes and shall be based on recognized methods of appraising and conform to USPAP (Uniform Standards of Appraisal Practice), as required by Connecticut General Statutes for the licensing and certification of all individuals involved in the appraisal of real estate. Any proposed modifications to the valuation schedules must be reviewed and analyzed with the Assessor prior to generating the proposed values for field review.

The Contractor will calculate a value estimate for each parcel that will be comprised of land, building, outbuildings, and total value. The Contractor shall compute to the nearest 100 dollars (\$100.00) the value of all properties.

### **A. MARKET APPROACH**

The Contractor must describe in detail its particular methods for generating values with the market approach. The Comparative Sales Approach or a Statistical Modeling Approach are the two techniques to be considered. If a statistical modeling approach is employed, the Contractor must specify the techniques employed and the types of property that will be valued with these techniques. If the direct sales comparison method is employed, the Contractor in its proposal must describe all adjustment techniques.

#### **1. Sales verification**

The validity of all residential sales in the Town for the period of April 1, 2014 through October 1, 2015 shall be determined by the Contractor and the Assessor. For vacant land, commercial/industrial, and special residential properties (i.e. waterfront) the Contractor and the Assessor will validate sales for the period of October 1, 2013 through October 1, 2015.

The Contractor must develop a program for verifying sales from sources other than the real estate conveyance documents. The sources for such information will include mail questionnaires (sales verification sheets) and may include telephone or field interviews, and third party sources such as multiple listing agencies, real estate services, private appraisers or brokers, and financial

institutions. Prior to implementation the program for sales verification must be approved by the Assessor.

The Contractor will perform a Full Measure and List of at least 95% of all sold properties. Properties wherein the owner refuses an interior inspection will be excluded from the interior inspection requirement. The Contractor will verify all sales with the owner and code them as useable or non-useable. Useable sales are defined as "arms-length" transactions that do not include foreclosures, family sales, auction sales, estate sales, etc. Sample sales verification mailer should be included at the time proposal is made. The sales inspections of the commercial properties will be conducted by the Contractor and the Appraiser. The Contractor will be in charge of coordinating these inspections with the Appraiser. The Contractor shall develop and provide the Assessor with written documentation for the sales verification effort.

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

## **B. BUILDING COST SCHEDULES**

### **1. General**

The Contractor shall prepare for usage in the project as hereinafter specified, building cost schedules. These schedules shall reflect the unit-in-place method based upon the square foot or cubic foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial, industrial, public utility and agricultural construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees and all other direct and indirect cost of construction. All finalized schedules shall be approved by the Assessor before adoption and usage by the Contractor.

### **2. Types of Cost Schedules**

#### **(i) Residential**

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

(ii) Commercial

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

(iii) Industrial and Special Structures

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

(iv) Farm

- a. Cost schedules for farm structures shall be in electronic format and shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to barns, shed, silos, milk houses, coops, etc.

(v) Depreciation Schedules

- a. Depreciation schedules or methods to be used in determining the amount of depreciation in electronic format 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 and shall be approved by the Assessor.

(vi) Schedule for Town

- a. The Contractor shall supply and leave for the Town three (3) copies of all of the above required building cost schedules and depreciation schedules for the Town's usage and one (1) in an electronic format. These shall be turned over to the Assessor upon approval of the schedules.

### C. INCOME APPROACH

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

Typical income and expense ratios shall be developed by the Contractor by property type and shall be approved by the Assessor.

Income and expense data gathered by the Town shall be utilized and verified by the Contractor for income producing and where appropriate, owner-occupied properties. The Contractor assisted by the Appraiser, subject to the approval of the Assessor, will handle the analysis of this data. Any income and expense data, including OPM form number M-58 with accompanying summary reports and rent schedules shall become property of the Town.

All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information) of the Connecticut General Statutes. The Contractor will be responsible for any data entry of income and expense data. From these returns and other data sources, such as field investigations and interviews, the Contractor will establish market or economic rent and expenses for income producing properties.

The Contractor assisted by the Appraiser shall also develop capitalization rates reflective of the Westport market environment by investigating sales and income data. Rates shall be established for the various classes of property and checked with bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been checked by the Assessor, the Contractor shall perform the income approach using both actual and economic income and expenses.

#### **D. LAND VALUATION**

The land values will be derived from market sales occurring from October 1, 2013 to October 1, 2015, land residual analysis, and/or the extraction method.

The Contractor will work in conjunction with the Assessor to set all land values. In the event any disagreement between the Assessor and the Contractor, the Assessor shall have the final decision confirming all land values and methods. When applicable, both the full value and the P.A. 490 value shall be calculated by the Contractor.

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

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

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

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

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

#### **E. NEIGHBORHOOD AND STREET DELINEATION**

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

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

#### **F. FIELD REVIEW**

All properties shall be reviewed in the field by Contractor's Reviewer and Appraisers. Properties shall be reviewed for classification, grade, depreciation and final value to assure that they are correlated to comparable properties.

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

The Assessor shall be notified of the dates of review and be entitled to accompany the Reviewer during this phase of the Revaluation. The Assessor shall be notified of the specific properties that have declined in value as a result of the field review.

#### **G. CERTIFICATION**

It is understood and agreed that the Revaluation of properties covered by this Contract shall exceed the standards as outlined in the Connecticut Performance Based Revaluation Standards and Certification of Revaluation (Connecticut General Statutes), and shall conform to the procedures and technical requirements of the Assessor. At least bi-weekly, the Contractor shall meet with the Assessor to discuss the progress and various other details of the project. The Assessor must certify that the values resulting from this project represent 70% of the fair market value pursuant to Section 12-63 of the Connecticut General Statutes.



**LAND AND BUILDING  
ANALYSIS**

Prepared by Steve Ferreira and Mike Tarello

1. Set Up: Know how data was collected

Land structure – acre curve or square footage  
Prime site – zoning specific or uniform size  
Data collection guidelines – know the data

2. Getting started: sales into the master file

Data entry of sales  
Legal conversion  
Remember unique ID's

3. Creating the sales file from the master:

Review the tables – building, land and outbuildings  
Adjoining towns – a source for data  
Start up base rates  
Marshall and Swift  
Coding sales

4. Beginning with a land study:

Where land sales are plentiful – existing town and new town  
Excel spreadsheets  
Coding land sales  
Without land sales – residual analysis, new construction, land to building ratios  
The assessor as a source for information  
Involve the Assessor  
Builders and realtors

5. Sales review:

Coordination between improved and vacant sales  
Reviewing the whole town for neighborhood factors  
Consistent development and application of review guidelines  
Condos – controlling data, using the tables

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6. Entering data from the sales review:

- Entering data in the sales file
- Entering data in the master file
- With two sets of rates
- Moving data and tables
- Coordination with the CI appraiser

7. Running sales ratio studies after sales review:

- The order of analysis
- Ratios by class
- Ratios by style
- Ratios by site index/neighborhood
- Ratios by lot size (the land curve)
- Ratios by age
- Ratios by building size (building size adjustment)
- Use of the report writer for special reports
- Residuals as documentation

8. Presenting the results to the Assessor

- Creating final documentation
- Review documentation
- Assessor documentation
- Revaluation monitors and Land Committees

9. The ongoing process:

- Preparations for full field review
- Transferring data to the Master file
- CI appraiser coordination
- Additional sales data during full field review
- Working out new sales during review
- Using your District Manager
- State final analysis reporting, etc.

10. The Vision Commercial Appraiser will conduct the standard procedures for producing the commercial values. This includes the review of actual market data including sales, cost data, income, expense, vacancy and cap rate information. This data will come from taxpayer information, surveys, cost manuals, deeds etc. The three methods of valuation will be considered in the development of values. During this process the Appraiser will work closely with the communities hired appraiser in the development of the tables, rates and reconciled commercial values. The Commercial Appraiser will also work closely with the Assessor and the independent Commercial appraiser in the development of the values.

## *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.

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*Vision Government Solutions  
Quality Assurance Program*

Following is a brief description of Vision's Quality Assurance Program. This program's overall goals are to:

1. Identify factors that affect quality.
2. Determine the frequency and importance of these factors.
3. Integrate this measurement process into production to provide immediate feedback.
4. Assist Managers in problem solving/error reduction.
5. Implement corrective action and evaluate results through control limits.
6. Provide on-going job awareness and identify quality work.

*Property Description*

An accurate description of the property is the most fundamentally important part of an appraisal. A City or Town can have the most sophisticated appraisal system in operation; but, if the data for the subject property is not accurate, the value will not be acceptable. An accurate property description provides the foundation for a solid revaluation.

*Random Sampling*

Through constant random sampling and immediate feedback and analysis, our Project Managers have the tools to monitor the job and implement corrective action; or to recognize an employee who is producing quality work. The results of this program will be reviewed with our Clients throughout the project.

*Quality Assurance Program  
General Outline*

Project Set-Up

Each employee is provided with a complete set of instructions and guidelines for the job, including:

1. Any minor variations from standard methods.
2. Any problem areas to look for.
3. Any specific items that the Client will be concerned about.

These instructions should be reviewed with the Client as well so that the Assessors are aware of, and are agreeable to, the tasks being performed before the job begins.

Rework Control Limits:

The following control limits will determine two (2) items:

1. Categories for rework.
2. Sample size for the Crew Chief.

Comprehensive Interior Check:

<b>Unacceptable Error</b>	<b>Error Category</b>	<b>Rate Control Limits</b>
Card or Parcel Missing	0.2%	
Building Missing	0.25%	
Section of Building Missing	2.0%	
Outbuilding Missing	3.0%	
Sketch Wrong	5.0%	
Interior Data Wrong	5.0%	
Subarea/Story Height Wrong	6.0%	
Outbuilding Wrong	8.0%	
Miscellaneous	8.0%	

If the Data Collector produces an error rate equal to or above the control limits, the Crew Chief must then increase the next sample size according to the appropriate "Sample Size Increase" table. This next sample must still be from the current "population" of Data Collection Forms. The Crew Chief will check each additional card only for the error that is above the control limits.

This cycle will continue until the error rate is below the control limits, or the entire week's work has been checked. If, at any point, there is an inordinate amount of consistent errors, the Crew Chief may return the remainder of the Data Collection Forms to the Data Collector for re-work.

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Drive-By Field Check:

After the first day and throughout the remainder of the project, the Crew Chief will drive by 60-70% of the weekly measures for each Data Collector. If any of the error categories are above the following control limits, the Crew Chief will check the rest of the work only for that category.

<b>Unacceptable Error</b>	<b>Error Category</b>	<b>Rate Control Limits</b>
Card or Parcel Missing	0.2%	
Building Missing	0.25%	
Section of Building Missing	2.0%	
Outbuilding Missing	3.0%	
Measure Building Wrong	5.0%	
Exterior Data Wrong	5.0%	
Subarea/Story Height Wrong	6.0%	
Outbuilding Wrong	8.0%	
Miscellaneous	8.0%	

New Data Collectors:

If any Data Collectors join the project after the start-up, the Crew Chief will use the same procedure as he/she used in Weeks One through Three. Specifically, the Crew Chief will check all of the first day's production and 20% for Weeks One through Three. Then, the Crew Chief will drop to the 6-12% check. Remember, throughout the job, he/she will always maintain the 60-70% level for the drive-by field review.

Example:

1. The Crew Chief has sampled 20 cards and finds one outbuilding missing, one measurement wrong, and one sketch mislabeled. The Crew Chief must then determine sample sizes for each of the errors. From Table 1 of the "Sample Size Increase" tables, the sketch label is within the rework limits, but the Crew Chief must check one more property for measurements and 14 more for missing outbuildings. Assuming he/she finds no more errors, the Crew Chief has completed that week's check and will meet with the Data Collector to review the quality worksheet as soon as possible.
2. Let's take the same original Data Collector errors in Example 1, and the Crew Chief has already sampled one more property for measurements, and 14 more for missing outbuildings. The Crew Chief finds no missing outbuildings; however, the measurements are wrong on the 21st card they checked. Now there are two errors out of 21 sampled, From Table II, the Crew Chief must sample 20 more properties from the same population and if there are no errors, the check is complete.

## PROPOSED PROJECT SCHEDULE WESTPORT, CONNECTICUT

*This proposed schedule is to work in conjunction with the schedule provided in the RFP and can be modified to accommodate the needs of the Town.*

<b>Task</b>	<b>Start</b>	<b>Completed</b>
Execution of Contract	7/07/2014	7/15/2014
Provide Performance Bond	7/15/2014	8/01/2014
Project Start-Up	8/01/2014	8/15/2014
Public Relations	On-going	
Quality Control	On-going	
Residential Data Collection	8/15/2014	6/30/2015
Commercial/Industrial Data Collection	9/15/2014	6/30/2015
Callback Appointment Process	9/15/2014	6/30/2015
Data Mailers	10/01/2015	7/15/2015
Neighborhood Delineation-Preliminary	1/15/2015	4/01/2015
Data Entry	On-going	
Sales Analysis- Preliminary	1/15/2015	4/01/2015
Preliminary Residential/ Commercial Cost and Depreciation Schedules	2/01/2015	8/31/2015
Prelim. Residential/ Commercial Land Unit Tables	2/01/2015	10/09/2015
Residential Review	5/01/2015	9/01/2015
Commercial Reviews/Industrial/Exempt Review	6/01/2015	9/28/2015
Final deeds entered into CAMA system by Assessor	10/01/2015	10/02/2015
Preliminary performance testing standards	10/02/2015	10/09/2015
Assessor's Review	10/15/2015	10/30/2015
Print Notices	11/02/2015	11/05/2015
Mail Notices	11/05/2015	11/06/2015
Informal Hearings	11/20/2015	12/13/2015
Submission of final Performance Testing Standards	12/27/2015	12/30/2015
Mail notices of results of Informal Hearings	01/08/2016	





## TOWN OF WESTPORT, CONNECTICUT

### Option 1

#### Percentage of Completed Work: (Recommended project percentages)

TASK	%
Bonding, Office Set-up, and Project Start up	3
Field Inspections and Data Collection	46
Data Entry	5
Data Mailers sent and data inputted	5
Valuation Analysis	12
Field Review and Data Entry	11
Final Valuations and Assessment Notices Mailed	7
Informal Hearings, Re-inspection, Adjustments complete	7
Board of Assessment Appeals, Completion of Duties	2
Litigation (Included in Performance Bond)	2
TOTAL	100

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**Option 2**

**Percentage of Completed Work: (Recommended project percentages)**

TASK	%
Bonding, Office Set-up, and Project Start up	3
Field Inspections and Data Collection	40
Data Entry	6
Data Mailers sent and data inputted	6
Valuation Analysis	13
Field Review and Data Entry	12
Final Valuations and Assessment Notices Mailed	8
Informal Hearings, Re-inspection, Adjustments complete	8
Board of Assessment Appeals, Completion of Duties	2
Litigation (Included in Performance Bond)	2
TOTAL	100



## ***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 400 assessing jurisdictions located throughout the Northeastern United States and the District of Columbia with installations that range from 5,000 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.

  
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Highlights of Advantages and Benefits of Vision Government Solutions

- o Vision Government Solutions is a leading provider of parcel-based software and provides a broad range of services to Assessment Departments throughout Connecticut. To complement our revaluation services we also provide strong Public Relations programs and have an MAI on staff for Expert Defense of Values.
- o Successfully completed over 50 valuation projects in the last three years in the Connecticut.
- o Software installed in over 400 Assessing offices, including 127 in the Connecticut.
- o Vision has a staff of over 140 people of which 80 are revaluation appraisal staff.
- o Successfully completed more than 200 valuation projects throughout New England in the last five years utilizing the Vision software, including the last Westport project.
- o Strong Quality Control Program from the Data Collection phase through the field review phase to insure proper property characteristics and uniformity of valuation methodology.

**Why Select the Vision Team?**

- o We are proposing a highly qualified, experienced appraisal staff led by Dave Arnold, Mike Tarello, Steve Ferreira and Sue Robinson. This team has a great attention to detail and will provide a quality revaluation product.
- o We have strong customer references; not only for our revaluation services, software design, development, and implementation, but for *service and support after the project*. In fact, fifty percent of our clients have been with Vision for over twenty years.
- o We possess the financial resources and requisite skills to successfully complete the project.
- o We have been in the revaluation business since 1975 and therefore have *domain expertise* in all areas of ad valorem appraisal and software.
- o We will provide a detailed public relations program for the project which will include the utilization of our web site to help guide the taxpayer in town through the entire revaluation project.
- o Our team works exclusively on Appraisal Vision CAMA, giving Vision the most experienced staff utilizing the proposed CAMA system for the project.

**REVALUATION REFERENCES**

**Similar Size Communities**

<i>Municipality</i>	<i>Contact</i>	<i>Phone</i>	<i>Year of SW Install</i>	<i>Year of Reval (s)</i>	<i>Number Parcels</i>
Wallingford, CT	Shelby Jackson	203-294-2001	2000	2001,2004, 2010	16,987 parcels
New Britain, CT	Mike Konik	860-826-3326	2001	2002,2007, 2012	17,000 parcels
Manchester, CT	John Rainaldi	860-647-3011	2000	2000,2006, 2011	18,289 parcels
Danbury, CT	Colleen LaHood	203-797-4556	2000	2002, 2007, 2012	27,700 parcels
Bridgeport, CT	Elaine Carvalho	203-576-8062	2006	2008	36,000 parcels
Stamford, CT	Frank Kirwin	203-977-4018	2002	2003, 2012	40,000 parcels
Hamden, CT	Ross Murray	203-287-7120	2000	2000, 2004,2010	20,000 parcels
New Haven, CT	Alex Pullen	203-946-8061	2001	2005,2011	30,000 parcels
West Haven, CT	Ann Marie Gradoia	203-937-3513	2000	2000,2005, 2010	17,106 parcels

**Waterfront Communities**

<i>Municipality</i>	<i>Contact</i>	<i>Phone</i>	<i>Year of SW Install</i>	<i>Year(s) of Revaluation work</i>	<i>Number Parcels</i>
Madison, CT	Orietta Nucolo	203-245-5651	1996	1997, 2002,2013,	8,433
West Haven, CT	Ann Marie Gradoia	203-937-3513	2000	2000,2005, 2010	17,000
Clinton, CT	Donna Sempey	860-664-1119	2000	2000,2010	7,075
East Lyme, CT	Donna Price-Bekech	860-739-6931	1992	2001,2006, 2011	9,253

*Please see Steve Ferreira's Waterfront Experience for Waterfront Experience outside Connecticut.*



## VISION CURRENT COMMITTED LIST

TOWN	PROJECT TYPE	FISCAL YEAR	COMPLETION DATE
Branford, CT	Update	2014	1/12/2015
Coventry, CT	Reval	2014	1/9/2015
Mansfield, CT	Update	2014	1/15/2015
New Fairfield, CT	Update	2015	12/22/2014
North Haven, CT	Update	2014	2/15/2015
Aquinnah, MA	Update	2015	9/30/14
Concord, MA	Update	2015	9/15/2014
Dudley, MA	Update	2015	10/15/2014
Edgartown, MA	Update	2015	9/30/2014
Hanover, MA	Update	2015	10/15/2014
Lakeville, MA	Update	2015	9/30/2014
Leominster, MA	Update	2015	10/17/2014
Marion, MA	Update	2015	9/30/2014
Mattapoissett, MA	Update	2015	10/30/14
Medford, MA	Update	2014	6/30/2016
Quincy, MA	Update	2015	10/30/2014
Sutton, MA	Update	2015	8/31/2014
Swansea, MA	Update	2015	10/1/2015
Tisbury, MA	Update	2015	9/30/2014

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TOWN	PROJECT TYPE	FISCAL YEAR	COMPLETION DATE
Wareham, MA	Reval	2015	9/1/2014
Yarmouth, MA	Update	2013	12/30/2014
Brewer, ME	Reval	2014	8/23/2014
Newmarket, NH	Update	2014	8/15/2014
Cranston, RI	Reval	2014	3/15/2015
Exeter, RI	Update	2014	3/1/2015
Foster, RI	Update	2014	2/26/2014
Middletown, RI	Reval	2015	4/7/2015



## RECENTLY COMPLETED CONNECTICUT REVALUATIONS

### 2007

Ansonia 2007  
Ashford 2007  
Berlin 2007  
Bristol 2007  
Canaan 2007  
Cromwell 2007  
Danbury 2007  
Eastford 2007  
Glastonbury 2007  
Goshen 2007  
Granby 2007  
Naugatuck 2007  
New Britain 2007

Preston 2007  
Redding 2007  
Roxbury 2007  
Stonington 2007  
Warren 2007  
Wilton 2007  
Winchester 2007  
Windsor 2007

### 2008

Bethlehem 2008  
Barkhamsted  
Bridgeport 2008  
Burlington 2008  
Chaplin 2008  
Essex 2008  
East Granby 2008  
Hampton 2008  
Kent 2008  
New Hartford 2008

New London 2008  
Lyme 2008  
Sharon 2008  
Suffield 2008  
Watertown 2008  
Weston 2008  
Wethersfield 2008  
Wilton 2008  
Windsor Locks 2008  
Union 2008



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**2009**

Tolland 2009  
Somers 2009  
Coventry 2009  
New Fairfield 2009  
Stratford 2009  
Branford 2009

Old Lyme 2009  
Brooklyn 2009  
Pomfret 2009  
Canterbury 2009  
Woodbridge 2009

**2010**

Clinton 2010  
Hamden 2010  
Deep River 2010  
Ellington 2010  
Voluntown 2010  
Wallingford 2010

West Haven 2010  
Westport 2010  
Oxford 2010

**2011**

Bridgewater 2011  
Brookfield 2011  
Columbia 2011  
East Lyme (Niantic) 2011  
Enfield  
Manchester 2011  
Marlborough 2011  
Middlebury 2011  
Middlefield 2011

Montville 2011  
New Haven 2011  
North Stonington 2011  
Salem 2011  
Seymour 2011  
Strafford 2011  
Westbrook 2011  
Wolcott 2011

  
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2012

Ansonia 2012  
Cannan 2012  
Cromwell 2012  
Danbury 2012  
East Haddam 2012  
Goshen 2012  
Granby, 2012  
New Britain 2012  
Orange 2012  
Preston 2012  
Redding 2012

Roxbury 2012  
Southbury 2012  
South Windsor 2012  
Stamford 2012  
Stonington 2012  
Warren 2012  
Waterford 2012  
Winchester 2012

2013

Bethlehem 2013  
Hampton 2013  
Union 2013  
Willington 2013  
Norwich 2013  
Bolton 2013  
East Granby 2013  
Kent 2013  
Litchfield 2013  
Middletown 2013  
Norwalk 2013  
Suffield 2013  
Wethersfield 2013

Chaplin 2013  
Lyme 2013  
Watertown 2013  
New London 2013  
Barkhamsted 2013  
Bridgeport 2013  
Essex 2013  
Lebanon 2013  
Madison 2013  
New Hartford 2013  
Sharon 2013  
Weston 2013  
Windsor Locks 2013

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**COMPLETED REVALUATION/UPDATES**

MASSACHUSETTS

Abington  
Acton  
Alford  
Amesbury  
Amherst  
Aquinnah  
Ashburnham  
Athol  
Attleboro  
Auburn  
Avon  
Barnstable  
Barre  
Berkley  
Berlin  
Blackstone  
Blandford  
Boxford  
Chelmsford  
Chelsea  
Clinton  
Concord  
Dedham  
Dighton  
Dracut  
Dudley  
Eastham  
Easthampton  
Easton  
Edgartown  
Essex  
Foxborough  
Gardner  
Georgetown  
Gloucester  
Goshen  
Gosnold  
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  
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  
Berwick  
Biddeford  
Boothbay  
Camden  
Cornish  
Cumberland  
Eliot  
Ellsworth  
Freeport  
Gardiner  
Harpwell  
Keanebunk  
Kennebunkport  
Kittery  
Monmouth  
Mount Desert  
Ogunquit  
Old Orchard Beach  
Raymond  
Rockland  
Rockport  
Sabattus  
Sanford  
Skowhegan  
South Portland  
South Thomaston  
Standish  
Topsham  
Waterville  
Wells  
West Bath  
Westbrook  
Winslow  
Winthrop  
York

VERMONT

Bridgewater  
Castleton  
Colchester  
Hartford  
Newport  
Williston

# VISION

GOVERNMENT SOLUTIONS

## 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  
Raymond  
Rindge

Rye  
Salem  
Sanbornton  
Sandown  
Seabrook  
Strafford  
Sunapee  
Swanzey  
Tilton  
Troy  
Warner  
Wilton  
Wolfeboro

## CONNECTICUT

Ansonia  
Andover  
Ashford  
Barkhamsted  
Berlin  
Bethlehem  
Branford  
Bridgeport  
Bridgewater  
Bristol  
Brookfield  
Brooklyn  
Burlington  
Canaan  
Canterbury  
Chaplin  
Chester  
Clinton  
Colechester  
Colebrook  
Columbia  
Coventry  
Cromwell  
Danbury  
Deep River  
Eastford  
East Granby  
East Haddam  
East Lyme  
Ellington  
Enfield  
Essex  
Fairfield  
Franklin  
Glastonbury  
Goshen  
Granby  
Griswold  
Groton

Haddam  
Hamden  
Hampton  
Kent  
Lebanon  
Ledyard  
Lyme  
Madison  
Manchester  
Mansfield  
Marlborough  
Middlefield  
Middlebury  
Milford  
Montville  
Naugatuck  
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  
Seymour  
Sharon  
Somers  
Southbury  
Southington  
South Windsor  
Sprague  
Stafford  
Stamford  
Stonington  
Strafford  
Stratford  
Suffield  
Thompson  
Tolland  
Torrington  
Trumbull

 **VISION**  
GOVERNMENT SOLUTIONS

Union  
Voluntown  
Wallingford  
Warren  
Waterford  
Watertown  
West Haven  
Westbrook  
Weston  
Westport  
Wethersfield  
Wilton  
Winchester  
Windsor  
Windsor Locks  
Wolcott  
Woodbridge  
Woodstock

**RHODE ISLAND**

Barrington  
Central Falls  
Charlestown  
Cranston  
East Providence  
Exeter  
Foster  
Jamestown  
Johnston  
Little Compton  
Middletown  
Narragansett  
Newport  
New Shoreham  
North Kingstown  
North Smithfield  
North Providence  
Pawtucket  
Portsmouth  
Richmond  
Smithfield  
South Kingstown  
Tiverton  
Warwick  
Westerly  
Woonsocket

**VISION**  
GOVERNMENT SOLUTIONS

**INSTALLED CAMA CLIENT LIST**

Andover	CT	John	Chaponis	860-742-7305
Ansonia	CT	Margaret	Dzwonchyk	203-736-5904
Ashford	CT	Lynn	Byberg	860-487-4403
Barkhamsted	CT	Francine	Beland	860-379-3600
Berlin	CT	Joe	Ferraro	860-828-7167
Bethlehem	CT	Carolyn	Nadeau	203-266-7510
Bloomfield	CT	Walter	Topliff	860-769-3532
Bolton	CT	Nicole	Linterur	860-649-8066
Branford	CT	Barbara	Neal	203-488-2039
Bridgeport	CT	Elaine	Carvalho	203-576-8062
Bridgewater	CT	Denise	Pinter	860-355-9379
Bristol	CT	Tom	DeNoto	860-584-6245
Brookfield	CT	Denise	Hames	203-775-7302
Brooklyn	CT	Kathleen	Thornton	860-774-5611
Burlington	CT	Richard	Lasky	860-673-3901
Canaan	CT	Hazel	McGuire	860-824-0707
Canterbury	CT	Jennifer	Sullivan	860-546-6035
Chaplin	CT	Chandler	Rose	860-455-0073
Clinton	CT	Donna	Sempey	860-664-1119
Colchester	CT	John	Chaponis	860-537-7205
Colebrook	CT	Michelle	Sloane	860-379-3738
Columbia	CT	Mary	Lavallee	860-228-9555
Cornwall	CT	Barbara	Bigos	860-672-2703
Coventry	CT	Patricia	Alessi	860742-4067
Cromwell	CT	Shawna	Baron CCMA II	860-632-3441
Danbury	CT	Colleen	LaHood	203-797-4556
Deep River	CT	Robin	O'Loughlin	860-526-6029
East Granby	CT	Mary Ellen	Brown	860-653-2852
East Haddam	CT	Loreta	Zdanys, CCMAII	860-873-5026
East Hampton	CT	Carol Ann	Tyler	860-267-2510
East Hartford	CT	Brian	Smith	860-291-7268
East Lyme Niantic	CT	Donna	Price-Bekech	860-739-6931 x107
Eastford	CT	Carol	Crawford	860-974-1291
Ellington	CT	Cynthia	Roman	860-870-3109
Enfield	CT	Della	Froment	860-253-6338
Essex	CT	Jessica	Sypher	860-767-4340
Fairfield	CT	Donald	Ross	203-256-3113
Franklin	CT	Richard	Lasky	860-642-6475

**VISION**  
GOVERNMENT SOLUTIONS

Glastonbury	CT	Nicole	Lintereur	860-652-7604
Goshen	CT	Lucy	Hussman	860-491-2115
Granby	CT	Sue	Altieri	860-844-5312
Griswold	CT	Leslie	Kornosewicz	860-376-7060
Haddam	CT	Marilyn	Baumann	860-345-8531
Hamden	CT	Ross	Murray	203-287-7120
Hampton	CT	Tina	Mitchell	860-455-9132
Harwinton	CT	Michele	McLaughlin	860-485-0898
Kent	CT	Patricia	Braislin	860-927-3160
Lebanon	CT	Thomas	Tanganelli	860-642-6141
Ledyard	CT	Paul	Hopkins	860-464-3237
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
Marlborough	CT	Marie	Hall	860-295-6201
Mashantucket Pequot Tr	CT	Frank	Fiori	860-396-2079
Middlebury	CT	Daniel	Kenny	203-758-1447
Middlefield	CT	Steven	Hodgetts	860-349-7111
Middletown	CT	Dannon	Braaseh	860-344-3454
Milford	CT	Dan	Thomas	203-783-3350
Monroe	CT	Elizabeth	Duffy	203-452-2803
Montville	CT	Lucy	Beit	860-848-3030
Morris	CT	Michele	McLaughlin	860-567-6096
Naugatuck	CT	George	Hlavacek	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	Beth	Paul	860-379-5235
New Haven	CT	Alex	Pullen	203 946-8061
New London	CT	Paige	Donovan	860-437-6317
New Milford	CT	Kathy	Conway	860-355-6070
Newington	CT	Steve	Juda	860-665-8535
Newtown	CT	Chris	Kelsey	203-270-4242
Norfolk	CT	Michele	Sloane	860 542-5287
North Branford	CT	Christine	Barta	203-484-6013
North Haven	CT	Gary	Johns	203-239-5321
North Stonington	CT	Darryl	Del Grosso	860-535-2877
Norwalk	CT	Michael	Stewart	203-854-7941
Norwich	CT	Donna	Ralston	860 823-3722

# VISION

GOVERNMENT SOLUTIONS

Old Lyme	CT	Walter	Kent	860-434-7959
Old Saybrook	CT	Norm	Wood	860-395-3137
Orange	CT	Mark	Branchesi	203-891-4722
Oxford	CT	Eva	Lintzner	203-888-2543
Plainfield	CT	Joyce	Stangeland	860-230-3006
Pomfret	CT	Bonnie	Duncan	860-974-1674
Preston	CT	Mildred	Peringer	860-889-2529
Putnam	CT	Rande	Chmura	860-963-6802
Redding	CT	John	Ford	203-938-5001
Rocky Hill	CT	Stuart	Topliff	860-258-2722
Roxbury	CT	Linda	Bertaccini	860-354-2634
Salem	CT	Barbara	Perry	860-859-3873
Salisbury	CT	Barbara	Bigos	860-435-5176
Scotland	CT	Susan	Rainville	860-423-9634
Seymour	CT	Joseph	Kusiak	203-881-5013
Sharon	CT	Patricia	Braislin	860-364-0205
Somers	CT	Pat	Juda	860-763-8202
South Windsor	CT	Charles	Danna	860-644-2511
Southbury	CT	Michael	Moriarty	203-262-0674
Southington	CT	Brian	Lastra	860-276-6205
Stafford	CT	Virginia	Giulmette	860-684-1786
Stamford	CT	Frank	Kirwin	203-977-4018
Stonington	CT	Marsha	Standish	860-535-5098
Stratford	CT	Melinda	Fonda	203-385-4025
Suffield	CT	Helen	Totz	860-668-3866
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	Mildred Millie	Peringer	860-376-3927
Wallingford	CT	Shelby	Jackson, III	203-294-2001
Warren	CT	Linda	Bertaccini	860-868-7881
Waterford	CT	Michael	Bekech	860-444-5822
Watertown	CT	Carolyn	Nadeau	860-945-5235
West Hartford	CT	Joe	Dakers	860-561-7416
West Haven	CT	Ann Marie	Gradoia	203-937-3513
Westbrook	CT	Pam	Fogarty	860-399-3016
Weston	CT	Ken	Whitman	203-222-2607
Westport	CT	Paul	Friia	203-341-1135
Wethersfield	CT	Chandler	Rose	860-721-2812
Willington	CT	Mary	Huda	860-487-3122



**VISION**  
GOVERNMENT SOLUTIONS

Wilton	CT	David	Lisowski	203-563-0123
Winchester	CT	Janice	McKie	860-379-5461
Windsor	CT	Lawrence	LaBarbera	860-285-1819
Windsor Locks	CT	Donna	Murphy	860-627-1448
Wolcott	CT	Pamela	Deziel	203-879-8100
Woodbridge	CT	Betsy	Quist	203-389-3417
Woodstock	CT	Richard	Kryzak	860-928-6929
Washington	DC	William	Nelson	202-442-6784
Alachua County	FL	Edward	Crapo, CFA, ASA	352-374-5230
Putnam County	FL	Tim	Parker	386-329-0300
Sumter County	FL	Shauna	Newell	352-569-6800
Taylor County	FL	Bruce	Ratliff	850-838-3511
Abington	MA	Jack	Pistorino	781-982-2107
Acton	MA	Brian	McMullen	978-264-9622
Amesbury	MA	Mary	Marino	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
Auburn	MA	Cindy	Cosgrove	508-832-7740
Avon	MA	Jaime	Velazquez	508-588-0414
Barnstable	MA	Jeff	Rudziak	1-508-862-4020
Barre	MA	Michael	Landry	978-355-2504
Berlin	MA	Diane	Peterson	978-838-2256
Blackstone	MA	Patricia	Salamone	508-883-1500
Boston	MA	Ronald	Rakow	617-635-4264
Boxford	MA	Kristin	Hanlon	978 887-6000
Boylston	MA	Margo	Richardson	508-869-6543
Cambridge	MA	Robert	Reardon	617 349 4343
Chelmsford	MA	Frank	Reen	978-244-3317
Chelsea	MA	Ken	Stein	617-466-4014
Clinton	MA	David	Baird	978-365-4117
Concord	MA	Lane	Partridge	978-318-3075
Dartmouth	MA	Richard	Gonsalves	508-910-1809
Dedham	MA	John	Duffy	781-751-9130
Dracut	MA	Kathy	Roark	978-454-2223
Dudley	MA	Lisa	Berg	508-949-8006
Duxbury	MA	Steve	Dunn	781-934-1100
Easthampton	MA	Mark	Dimauro	413-529-1401
East Longmeadow	MA	Diane	Hildreth	413-525-5425

**VISION**  
GOVERNMENT SOLUTIONS

Easton	MA	Robbie	Alford	508-230-0520
Edgartown	MA	Jo Ann	Resendes	508-627-6141
Foxborough	MA	Hamelore	Simonds	508-543-1200
Gardner	MA	Diane	Lanney	978-630-4004
Georgetown	MA	Jay	Ferreira	978-352-5708
Gloucester	MA	Nancy	Papows	978-281-9715
Gosnold	MA	Kris	Lombard	508-990-7408
Granby	MA	Keri-Ann	Wenzel	413-467-7196
Groton	MA	Rena	Swezey	978-448-1127
Hadley	MA	Dan	Zdonek	413-586-6320
Hamilton	MA	Tina	Zelano	978-468-5574
Hampden	MA	Stanley	Witkop	413-566-3223
Hanover	MA	Bob	Cole	781-826-5000
Harvard	MA	Fred	Aponte	978-456-4100
Hingham	MA	Rick	Nowlan	781-741-1455
Holden	MA	Rosemary	Scully	508-210-5516
Holland	MA	JoAnn	Higgins	413-245-7108
Hubbardston	MA	Justine	Lapierre	978-928-1400
Hudson	MA	JoAnn	McIntyre	978-568-9620
Kingston	MA	Jim	Judge	781-585-0509
Lakeville	MA	Molly	Reed	508-947-4428
Lawrence	MA	Breda	Daou	978-620-3193
Leominster	MA	Walter	Poirier	978-534-7531
Lexington	MA	Rob	Lent	781-862-0500
Longmeadow	MA	Bob	Leclair	413-565-4115
Lowell	MA	Sue	Lemay	978-970-4212
Mansfield	MA	Nancy	Hinote	508-261-7350
Marion	MA	Patricia	De Costa	508-748-3518
Marlborough	MA	Paula	Murphy	508-460-3779
Mattapoissett	MA	Kathy	Costello	508-758-4106
Medford	MA	Ed	O'Neil	781-393-2430
Middleborough	MA	Barbara	Erickson	508-946-2410
Millbury	MA	Sandy	Gema	508-865-4732
Millis	MA	Paula	Dumont	508-376-7049
Monson	MA	Anne	Murphy	413-267-4120
Nantucket	MA	Deb	Dilworth	508-228-7200
New Salem	MA	Wayne	Hachey	978-544-2731
Newburyport	MA	Dan	Raycroft	978-465-4403
Newton	MA	Elizabeth	Dromey	617-796-1160
Norfolk	MA	John	Neas	508-528-1120
North Attleborough	MA	Sheila	Scaduto	508-699-0117

**VISION**  
GOVERNMENT SOLUTIONS

Northbridge	MA	Robert	Fitzgerald	508-234-2740
Norwell	MA	Barbara	Gingras	781-659-8014
Norwood	MA	Paul	Waneczek	781-762-1240
Oak Bluffs	MA	David	Bailey	508-693-3554
Oakham	MA	Board of Assessors		508-882-5549
Otis	MA	Lee	Marcella	413-269-0102
Palmer	MA	Linda	LeBlanc	413-283-2607
Paxton	MA	Kathleen	Stanley	508-799-7231
Pelham	MA	Martha	Leamy	413-253-0734
Petersham	MA	Kelly	Garlock	978-724-6658
Phillipston	MA	Kelly	Garlock	978-249-1732
Plainville	MA	Mary Jo	LaFreniere	508-695-3142
Plympton	MA	Deb	Stuart	781-585-3227
Quincy	MA	Peter	Moran	617-376-1173
Randolph	MA	Jolanta	Briffett	781-961-0906
Rehoboth	MA	Peter	Jacobson	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	413-862-6203
Rutland	MA	Alyce	Johns	508-886-4101
Sharon	MA	Mark	Mazur	781-784-1507
Shrewsbury	MA	Christopher	Reidy	508-841-8353
Shutesbury	MA	Ken	Holmberg	413-259-3790
Somerville	MA	Marc	Levy	617-625-6600
South Hadley	MA	Melissa	Couture	413-538-5027
Southampton	MA	Lori	Stewart	413-527-4741
Southbridge	MA	Wilfrid	Cournoyer	508-764-5404
Southfield	MA	Scott	Bois	781-682-2187
Southwick	MA	Sue	Gore	413-569-0565
Spencer	MA	Mary	Williams	508-885-7500
Sterling	MA	Harald	Scheid	978-422-8113
Stockbridge	MA	Mike	Blay	413-298-4174
Sturbridge	MA	William	Mitchell	508-347-2503
Sutton	MA	Joyce	Sardagnola	508-865-8722
Swansea	MA	Jane	Piccerelli	508-324-6702
Taunton	MA	Barry	Cooperstein	508-821-1009
Templeton	MA	Sue	Byrne	978-939-2793
Tewksbury	MA	Joanne	Foley	978-640-4330

**VISION**  
GOVERNMENT SOLUTIONS

Tisbury	MA	Ann Marie	Cywinski	508-696-4207
Topsfield	MA	Pauline	Evans	978-887-1514
Wales	MA	Dick	Verville	413-245-7571
Walpole	MA	Dennis	Flis	508-660-7314
Wareham	MA	Elsa	Miller	508-291-3100
Wayland	MA	Ellen	Brideau	508-358-3658
Wenham	MA	Shirley	Cashman	978-468-5520
West Boylston	MA	Karen	Pare	508-450-7281
West Springfield	MA	Hans	Doup	413-263-3053
West Tisbury	MA	Kristina	West	508-696-0101
Westfield	MA	Robin	Whitney	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
Wilmington	MA	Karen	Rassias	978-694-2021
Winthrop	MA	Paul	Tierney	617-846-2716
Woburn	MA	Andrew	Creen	781-897-5830
Worcester	MA	William	Ford	508-799-1024
Yarmouth	MA	Matt	Zurowick	508-398-2231
Arundel	ME	Beth	Newcomb	207-985-4201
Augusta	ME	Lisa	Morin	207-626-2320
Bar Harbor	ME	Marc	Perry	207-288-3320
Berwick	ME	Mike	Marsh	207-698-1101
Biddeford	ME	Frank	Yattaw	207-284-9003
Boothbay	ME	Lori	Colton	207-633-2051
Boothbay Harbor	ME	Barbara	Wilson	207-633-3671
Brewer	ME	Steven	Weed	207-989-7560
Brunswick	ME	Cathleen	Donovan	207-725-6650
Camden	ME	Wes	Robinson	207-236-3353
Casco	ME	David	Morton	207-627-4515
Chebeague Island	ME	Scott	Seaver	207-846-3148
Cornish	ME	Diane	Harrington	207-625-4324
Cumberland	ME	Bill	Healey	207-829-2204
Eliot	ME	Martine	Painchaud	207-439-1813
Ellsworth	ME	Larry	Gardner, CMA	207-667-8674
Falmouth	ME	Anne	Gregory	207-781-5253
Freeport	ME	Robert	Konczal	207-865-4743
Gardiner	ME	Curt	Lebel	207-582-6892
Gorham	ME	Mike	D'Arcangelo	207-222-1600
Harpswell	ME	Debbie	Turner	207-833-5771

# VISION

GOVERNMENT SOLUTIONS

Kennebunk	ME	Daniel	Robinson	207-985-2102
Kennebunkport	ME	Werner	Gilliam	207-967-0402
Kittery	ME	Bruce	Kerns	207-439-0452
Monmouth	ME	Laurie	Walker	207-933-2206
Mount Desert	ME	Kyle	Avila	207-276-5531
North Yarmouth	ME	Marnie	Diffin	207-829-3705
Ogunquit	ME	Barbara	Kinsman	207-646-5140
Old Orchard Beach	ME	George	Green	207-934-5714
Raymond	ME	Kevin	Woodbrey	207-655-4712
Richmond	ME	Laurisa	Loon	207-737-4305
Rockland	ME	Dennis	Reed	207-594-0303
Rockport	ME	Kerry	Leichtman	207-236-6758
Sabattus	ME	Donna	Hayes	207-375-4331
Saco	ME	Jim	Thomas	207-282-1611
Sanford	ME	Jeffrey	Geaumont	207-324-9115
Skowhegan	ME	Leisa	Porter	207-474-6903
South Portland	ME	Elizabeth	Sawyer	207-767-7604
South Thomaston	ME	Barbara	Black	207-596-6584
Standish	ME	Peter	Arnemann	207-642-4572
Topsham	ME	Justin	Hennessy	207-725-1722
Waterville	ME	Paul	Castonguay	207-680-4200
Wells	ME	Tanya	Freeman	207-646-6081
West Bath	ME	Robert	Morris	207-443-4342
Westbrook	ME	Elizabeth	Sawyer	207-854-0638
Windham	ME	David	Sawyer	207-892-1903
Winslow	ME	Judy	Mathiau	207-872-2776
Winthrop	ME	Donald	Caldwell	207-377-7200
Yarmouth	ME	Bill	Healey	207-846-9036
York	ME	Rick	Mace	207-363-1005
Bloomington	MN	Matthew	Gersemehl	952-563-8708
Hennepin County	MN	James	Atchison	612-348-4567
Acworth	NH	Board of	Selectmen	603-835-6879
Alton	NH	Tom	Sargent	603-875-0205
Amherst	NH	Michele	Crowley	603-673-6041
Ashland	NH	Ann	Abear	603-968-4432
Bedford	NH	Bill	Ingalls	603-792-1316
Belmont	NH	Jeanne	Beaudin	603-267-8300
Bethlehem	NH	Claudia	Brown	603-869-3351
Bow	NH	Monica	Gordon	603-228-1187
Bridgewater	NH	Terry	Murphy	603-744-5055
Campton	NH	Anne Marie	Foot	603-726-3223

**VISION**  
GOVERNMENT SOLUTIONS

Candia	NH	Cheryl	Eastman	603-483-8101
Center Harbor	NH	Robin	Woodaman	603-253-4561
Charlestown	NH	Board of	Selectmen	603-826-4400
Chester	NH	Jean	Packard	603-887-4045
Chesterfield	NH	Board of	Selectmen	603-363-4624
Claremont	NH	Dan	Langille	603-542-7004
Concord	NH	Kathy	Temchack	603-225-8550
Derry	NH	David	Gomez	603-432-6100
Dunbarton	NH	Line	Comeau	603-774-3541
Durham	NH	Jim	Rice	603-868-8064
Easton	NH	Gary	Fournier	603-522-9188
Enfield	NH	Julie	Huntley	603-632-5026
Epping	NH	Joyce	Blanchard	603-679-5441
Exeter	NH	John	DeVittori	603-778-0591
Fremont	NH	Heidi	Carlson	603-895-9035
Goffstown	NH	Scott	Bartlett	603-497-8990
Gorham	NH	Michelle	Lutz	603-466-3322
Grantham	NH	Melissa	White	603-863-6021
Greenland	NH	Karen	Anderson	603-431-7111
Hampton	NH	Ed	Tinker	603-929-5914
Hampton Falls	NH	Dianna	Calder	603-926-4618
Hanover	NH	Mike	Ryan	603-640-3206
Henniker	NH	Cindy	Marsland	603 428 3221
Hinsdale	NH	Kathryn	Lynch	603-336-5727
Hollis	NH	Connie	Cain	603-465-9860
Hooksett	NH	Elayne	Pierson	603-268-0003
Jaffrey	NH	Michael	Hartman	603-532-7880
Laconia	NH	John	Duhamel	603-527-1268
Lincoln	NH	Helen	Jones	603-745-2757
Littleton	NH	Amy	Hatfield	603-444-3996
Lyme	NH	Diana	Calder	603-795-4639
Lyndeborough	NH	Kate	Thorndike	603-654-5955
Manchester	NH	Mike	Hurley	603-624-6520
Meredith	NH	Jim	Commerford	603-279-4538
Milford	NH	Marti	Noel	603-249-0615
Moultonborough	NH	Gary	Karp	603-476-2347
New Durham	NH	Vickie	Blackden	603-859-2091
New Hampton	NH	Barbara	Lucas	603-744-3559
New London	NH	Jessie	Levine	603-526-4821
Newbury	NH	Norm	Bernaiche	603-763-4940
Newmarket	NH	Terri	Littlefield	603-659-3073

**VISION**  
GOVERNMENT SOLUTIONS

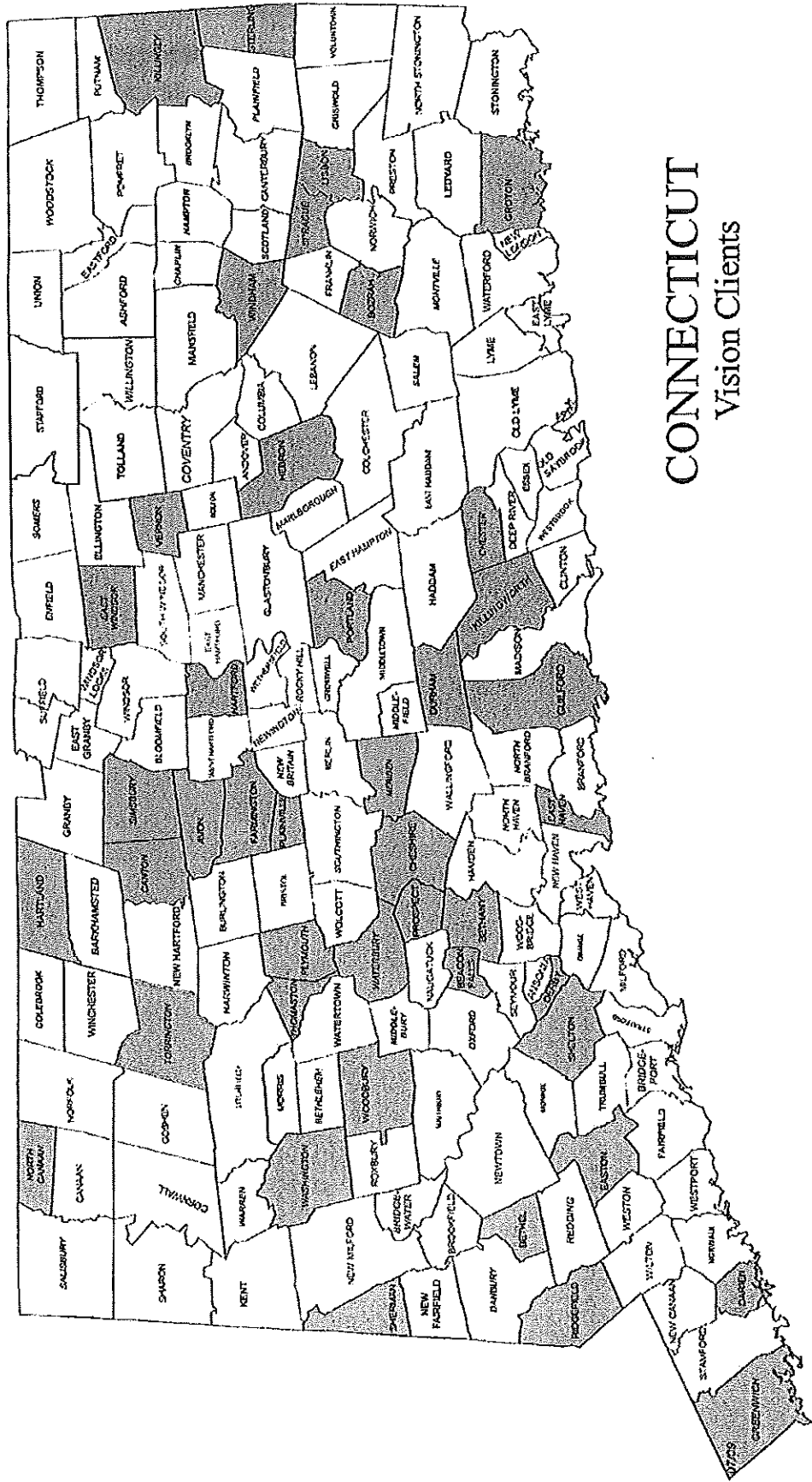
North Hampton	NH	Dave	Caron	603-964-8087
Northumberland	NH	Elaine	Gray	603-636-1450
Pelham	NH	Susan	Snide	603-508-3080
Pembroke	NH	Elaine	Wesson	603-485-4747
Portsmouth	NH	Rosann	Maurice-Lentz	603-610-7212
Raymond	NH	Donna	Giberson	603-895-4735
Rindge	NH	David	DuVernay	603-899-5181
Rye	NH	Joanne	Drewniak	603-964-5523
Salem	NH	Normand	Pelletier	603-890-2018
Sanbornton	NH	Rob	Jutton	603-729-8005
Sandown	NH	Lynn	Blaisdell	603-887-3646
Seabrook	NH	Angela	Silva	603-474-2966
Strafford	NH	Liz	Evans	603-664-2192
Sugar Hill	NH	Jennifer	Gaudette	603-823-8468
Sunapee	NH	Donna	Nashawaty	603-763-2212
Swansey	NH	Amy	Bush	603-352-7411
Tamworth	NH	Cassandra	Pearce	603-323-7525
Troy	NH	Board of	Selectmen	603-242-7722
Wilton	NH	Pam	Atwood	603-654-9451
Windham	NH	Rex	Norman	603-434-7530
New York City	NY	Warren	Hyman	212-291-4820
Rye	NY	Mitchell	Markowitz	914-939-3566
Bradford County	PA	Donna	Roof	570-265-1714
Crawford County	PA	Joe	Galbo	814-333-7305
Franklin County	PA	Gary	Martin, CPE	717 261-3801
Greene County	PA	John	Frazier	724-852-5240
Susquehanna County	PA	Tom	Button	570 278-4600
Tioga County	PA	Deborah	Crawford, CPE	570 723-8112
Warren County	PA	Karon	Beardsley, CPE	814 728-3424
Charlestown	RI	Kenneth	Swain	401-364-1233
Cranston	RI	Sal	Saccoccio	401-780-3188
Cumberland	RI	Patti	Acquaviva-Aubin	401-728-2400
East Providence	RI	Steve	Hazard	401-435-7574
Jamestown	RI	Ken	Gray	401-423-9802
Johnston	RI	Kim	Gallonio	401-553-8828
Little Compton	RI	Denise	Cosgrove	401-635-4509
Middletown	RI	George	Durgin	401-847-7300
Narragansett	RI	John	Majeika	401-782-0604
New Shoreham	RI	Lisa	Ommerle	401-466-3217
Newport	RI	John	Gelati	401-845-5365
North Kingstown	RI	Linda	Cwiek	401-294-3331

**VISION**  
GOVERNMENT SOLUTIONS

North Providence	RI	Janeese	Muscatelli	401-232-0900
Pawtucket	RI	Robert	Burns	401-728-0500
Portsmouth	RI	Matt	Helfand	401-683-1536
Providence	RI	Dave	Quinn	401-421-5900
Richmond	RI	Elizabeth	Fournier	401-539-9000
Smithfield	RI	Suzanne	Kogut	401-233-1015
South Kingstown	RI	Jean-Paul	Bouchard	401-789-9331
Warwick	RI	Kenneth	Malletto	401-738-2000
Westerly	RI	Charles	Vacca	401-348-2541
Woonsocket	RI	Chris	Celeste	401-767-9273
Albemarle County	VA	Robert	Willingham	434-296-5856
Charlottesville City	VA	Roosevelt	Barbour	434-970-3136
Chesapeake City	VA	William	Rice	757-382-6235
Culpeper County	VA	W.	Kilby	540-727-3411
Gloucester County	VA	Derek	Greene	804-693-1325
Henrico County	VA	Tom	Little	804 501-5346
Manassas City	VA	John	Grzejka	703-257-8222
New Kent County	VA	Laura	Ecimovic	804-966-9610
Northampton County	VA	Anne	Sayers	757-678-0446
Portsmouth City	VA	Janey	Culpepper	757-393-8631
Staunton City	VA	James	Gallaher	540-332-3827
Suffolk City	VA	Jean	Jackson	757-514-7479
York Count	VA	Rick	Millman	757-890-3720
Bridgewater	VT	Board of Listers		802-672-3334
Colchester	VT	Robert	Vickery	802-264-5671
Hartford	VT	Clarissa	Holmes	802-478-1109
Newport	VT	Spencer	Potter	802-334-6992
Pittsford	VT	Linda	Trask	802-483-6500
Stratton	VT	Kent	Young	802-896-6184
Brookfield City	WI	Robert	Lorier	262-796-6648
Cudahy City	WI	Sue	Plutshack	414 769-2207
La Crosse City	WI	Mark	Schlafer	608-789-7525
Neenah City	WI	Chris	Haese	920-886-6125
Pewaukee City	WI	Patrick	Chaneske	262 691-0820
Waukesha City	WI	Paul	Klauck	262-524-3510
Wauwatosa City	WI	Steve	Miner	414-479-8969

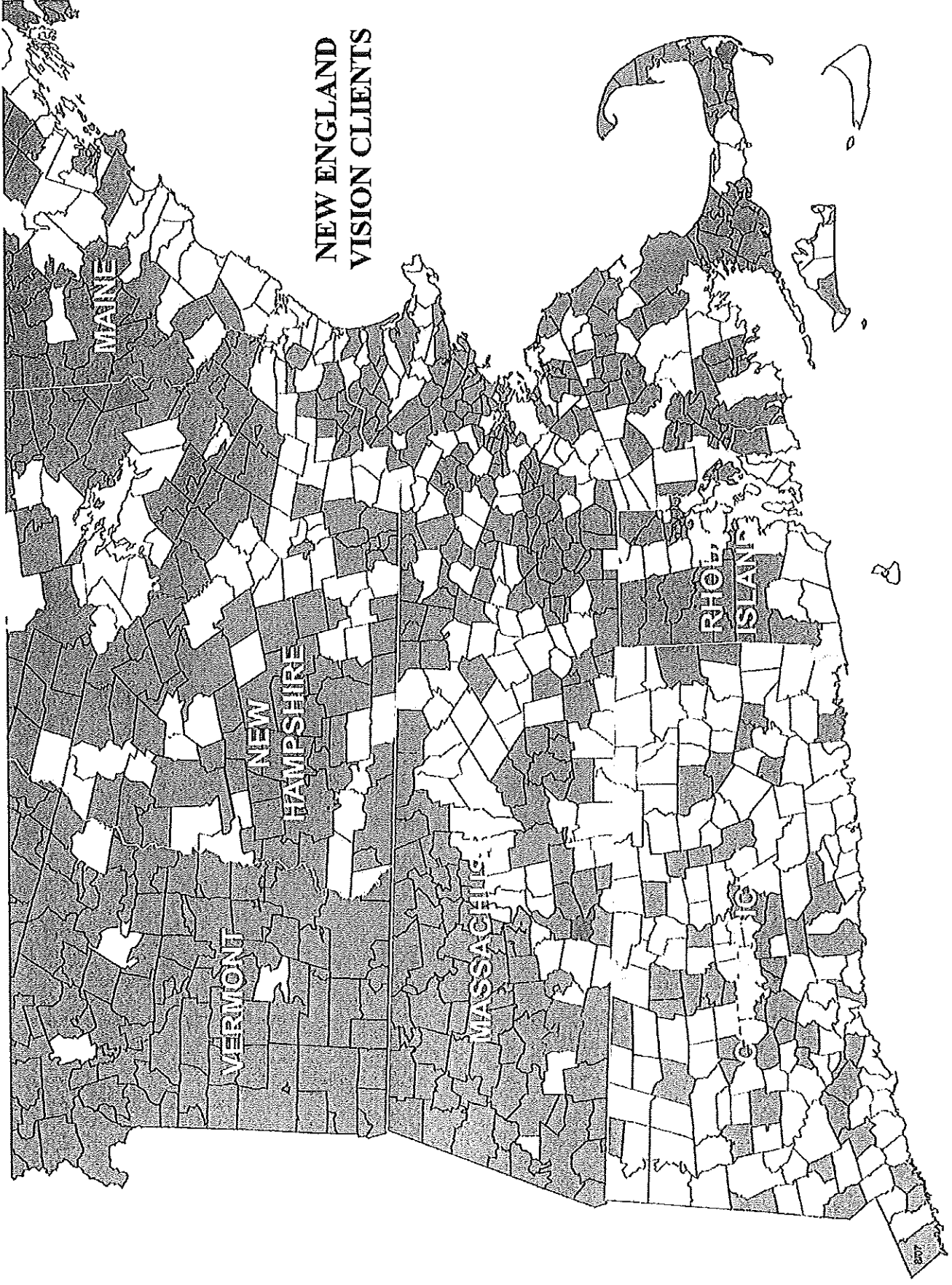
2/7/2014





# CONNECTICUT

## Vision Clients



**NEW ENGLAND  
VISION CLIENTS**

MAINE

VERMONT

NEW  
HAMPSHIRE

MASSACHUSETTS

RHODE  
ISLAND

CONNECTICUT

*Vision Government Solutions  
Public Relations Program*

Over the past five 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.

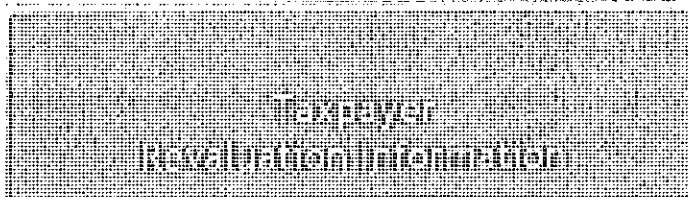
5. Specialty Items: Priced outside of the contract.

- 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.



### 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 a 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

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

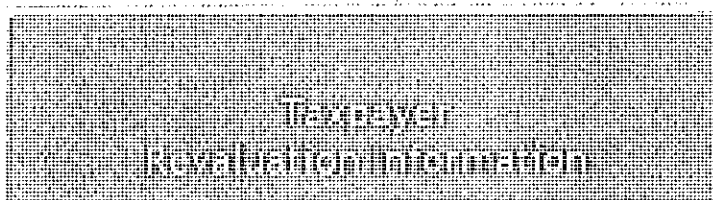
### LINKS

[Vision Home Page](#)  
[Online Property Database](#)  
[NH Dept of Assessor](#)  
[Rhode Island Dept of Tax](#)  
[MA Assoc. of Assessing Officers](#)  
[CT Assoc. of Assessing Officers](#)  
[NJ Assoc. of Assessing Officers](#)  
[NH Assoc. of Assessing Officers](#)  
[VT Assoc. of Assessing Officers](#)  
[VT Assessment & Values Assoc.](#)

### Helpful Videos

[Goals of a Revaluation](#)  
[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.



### Is My Assessment Correct?

The following 4 questions and accompanying information can help you to decide if your assessment is correct.

Please note: If you are concerned that your taxes are going to double because your property value has doubled, that is usually not the case. Since everyone else's property value is also rising, the tax rate usually drops somewhat proportionately to the amount of total increases to a City or Town's total value.

#### 1) Can I sell my property for that amount?

The first thing that you should do is ask yourself if you could sell the property for approximately that amount. (Please note that assessments in Connecticut reflect 70% of market value.)

#### 2) Does the Assessing department have the correct information on my property?

You can review the information that the Assessing Department has collected on your property to make sure the data is accurate. Some towns allow access to property information on the internet. You can check if your City or Town makes the information available in the Vision Appraisal Online Database. If the

[Return to Home Page](#)

### Taxpayer Assistance

[Frequently Asked Questions](#)  
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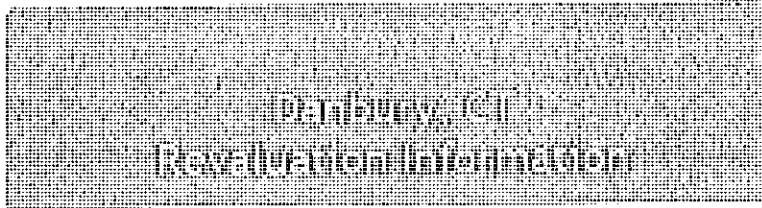
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[MA Assoc. of Assessing Officers](#)  
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[NJ Assoc. of Assessing Officers](#)  
[NH Assoc. of Assessing Officers](#)  
[VT Assoc. of Assessing Officers](#)  
[VT Assessment & Values Assoc.](#)

### Helpful Videos

[Goals of a Revaluation](#)  
[Types of Revaluations](#)  
[How to Read Values](#)  
[How to Read Values](#)  
[How does Property Cost Get Affected?](#)

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.



**Welcome**

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[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 & Voters Assoc.](#)

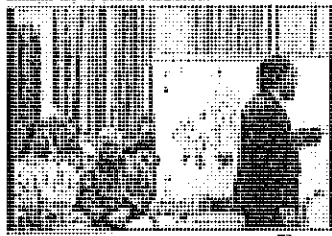
**Helpful Videos**

- [Goals of a Revaluation](#)

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



**Goals of a Revaluation**



Launch in external player

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**

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- [RI Assoc. of Assessing Officers](#)
- [NH Assoc. of Assessing Officers](#)
- [ME Assoc. of Assessing Officers](#)
- [VT Assessors & Voters Assoc.](#)

**Helpful Videos**

- [Goals of a Revaluation](#)
- [Types of Revaluations](#)
- [Market Value](#)
- [How are Multiple Values](#)
- [How Does a Property Condition](#)
- [25% of 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.

  
GOVERNMENT SOLUTIONS

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DAVID ARNOLD

---

**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2007 – Present, Vice President of 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 New England. 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.

**1990 – 2007, District Appraisal Manager**

Primary Responsibilities: Direct and manage all appraisal operations in Connecticut, Western Massachusetts, and Western New Hampshire. Oversee the timely completion of revaluation and valuation update projects throughout the district. Train, supervise, and evaluate project managers, staff appraisers, and support staff.

**1989, 1990, Senior Appraiser/Project Supervisor**

Primary Responsibilities: Provide day to day management of revaluation and valuation update projects throughout New England. Oversee the delegation of individual tasks to staff appraisers and support staff as well as quality control of work and supervision of employees. Handle the coordination of overlapping timelines for sales inspections, field review, permit field work, public notification, informal hearings and municipal deadlines. Work closely with town officials to keep public informed. Review monthly project status reports and periodic valuation progress with assessor. Provide final valuation and state certification documentation at close of project.

**1985 – 1989, Staff Appraiser**

Primary Responsibilities: Review values of properties to finalize various revaluation projects in New Hampshire, Massachusetts and Connecticut. Analyze values of recently sold properties and vacant land in order to recommend adjustments to overall values for each municipality. Apply appropriate adjustments for economic, functional, and physical depreciation. Work with local officials and conduct informal public hearings.

**EDUCATION**

Westfield State College  
B.S. Business Management

**SPECIAL QUALIFICATIONS**

State of New Hampshire: Certified Project Supervisor  
State of Vermont: Certified Project Supervisor  
State of Connecticut: Certified as Supervisor, Residential/Commercial/Personal  
Property Appraiser  
State of Connecticut: Certified General Appraiser #34  
State of Massachusetts: Certified General Appraiser #10280

STATE OF CONNECTICUT

Certificate No: 285

Expiration Date: April 30, 2016

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division

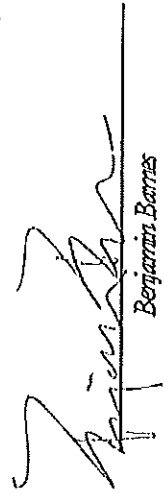
*be it known that*


**David A. Arnold**

*having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for*

**Land/Residential  
Commercial/Industrial  
Personal Property  
Supervisor**

*in witness thereof, this certificate is issued by*

  
Benjamin Barnes  
Secretary

  
W. David LeVasseur  
Acting Undersecretary



**STATE OF CONNECTICUT  
DEPARTMENT OF CONSUMER PROTECTION**  
165 Capitol Avenue ♦ Hartford Connecticut 06106

Attached is your license. Such license shall be shown to any properly interested person on request. Questions regarding this license can be emailed to the Real Estate Unit at [dep.realestate@ct.gov](mailto:dep.realestate@ct.gov).  
Visit our website to verify licensure and download applications at [www.ct.gov/dep](http://www.ct.gov/dep).

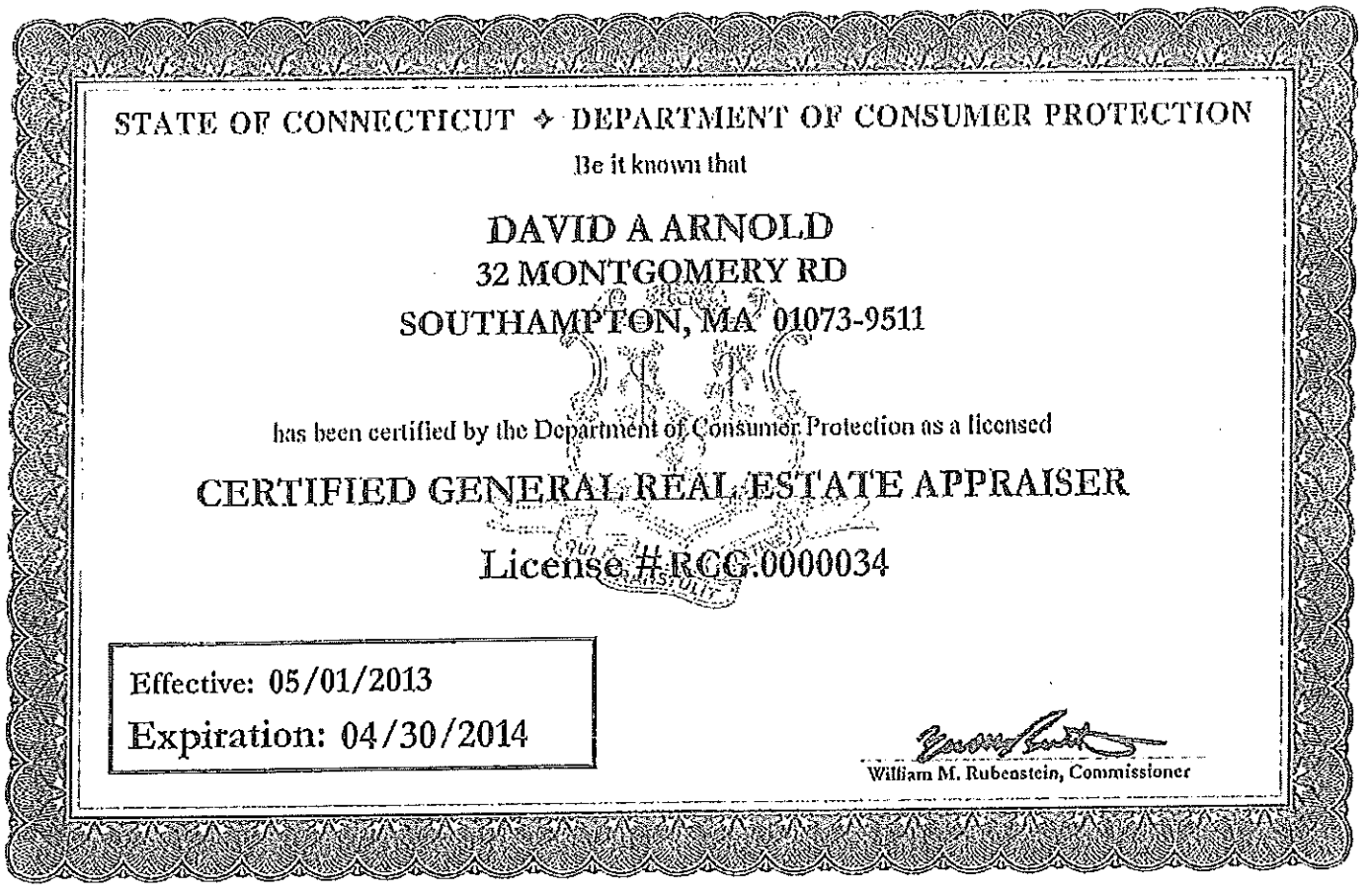
DAVID A ARNOLD  
32 MONTGOMERY RD  
SOUTHAMPTON, MA 01073-9511



CERTIFIED GENERAL REAL ESTATE APPRAISER  
DAVID A ARNOLD  
32 MONTGOMERY RD  
SOUTHAMPTON, MA 01073-9511

LIC./REG NO. RCG.0000034	EFFECTIVE 05/01/2013	EXPIRES 04/30/2014
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SIGNED \_\_\_\_\_



STATE OF CONNECTICUT ♦ DEPARTMENT OF CONSUMER PROTECTION

Be it known that

**DAVID A ARNOLD  
32 MONTGOMERY RD  
SOUTHAMPTON, MA 01073-9511**

has been certified by the Department of Consumer Protection as a licensed

**CERTIFIED GENERAL REAL ESTATE APPRAISER**

License # RCG.0000034

Effective: 05/01/2013

Expiration: 04/30/2014

William M. Rubenstein, Commissioner

 **VISION**  
GOVERNMENT SOLUTIONS

---

**JOHN MICHAEL TARELLO, MAI, ASA, MRA, MBA**

---

**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**1992 – Present, District Manager**

To oversee and manage appraisal operations. 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 as part of yearly management agreements with the company's municipal clientele. Developed a division of Fee Appraisal within the company. Designed and implemented various narrative appraisal and income analysis products.

**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**

**1987 – 1987, Fee Appraiser**

**QUALITY CONSTRUCTION, INC., LOWELL, MA**

**1986 – 1987, Builder**

**CENTURY 21, MELROSE, MA**

**1985 – 1986, Sales and Rental Person**

**EDUCATION**

**University of Massachusetts, Amherst, Massachusetts**

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

**Western New England College, 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

**VISION**  
GOVERNMENT SOLUTIONS

**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 Chapter:** Board of Director, Past President, Vice President, Treasurer, Secretary, 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)

**International Association of Assessing Officers:** Certified Member

**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

**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 CONNECTICUT

Certificate No: 446

Expiration Date: April 30, 2018

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division

be it known that

**John Michael Tarello**

having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for

**Land/Residential  
Commercial/Industrial  
Supervisor**

in witness thereof, this certificate is issued by

*Benjamin Barnes*

Benjamin Barnes  
Secretary

*W. David LeVasseur*

W. David LeVasseur  
Acting Undersecretary

 **VISION**  
GOVERNMENT SOLUTIONS

---

**STEPHEN FERREIRA**

---

**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**1984 – Present, Eastern New England District Manager**

Duties include overseeing all Appraisal Operations in Eastern New England, coordinating large staff of appraisers, programmers and support staff and managing annual client consulting services such as valuation updates, cyclical reinspections/building permit work and defense of values.

**M.A.S., FALL RIVER, MA**

**1975 – 1984, Appraiser**

Residential and Commercial Appraisals for Ad Valorem Tax purposes with a specialty in Land Valuation and Review. Experience in Massachusetts, Vermont, Rhode Island, Connecticut, New Hampshire and Alabama as a Tax Equalization Supervisor and Review Appraiser. Development and Valuation experience with Municipal Appraisal's PREMISYS Software.

**EDUCATION**

**Stonehill College, North Easton, Massachusetts**  
Bachelor of Arts: Liberal Arts

**Massachusetts Board of Real Estate Appraisers**  
Real Estate Appraisal II

**Massachusetts Association of Assessing Officers**  
Course 3: Mass Appraisal of Income Properties  
Course 4: Narrative Report Writing  
Course 5: Mass Appraisal for AD Valorem Taxation

**International Association of Assessing Officers**  
Course 301: Mass Appraisal of Residential Property  
Course 302: Mass Appraisal of Income Producing Property  
IAAO - Qualified Instructor

**Lincoln Institute of Land Policy**  
Commercial/Industrial Valuation  
Assessing Land Subject to Conservation Easements

**American Society of Appraisers**  
Uniform Standards of Professional Appraisal Practice (USPAP)

**CERTIFICATIONS**

**American Society of Appraisers - Senior Member Real Property/Ad Valorem**

**Massachusetts Appellate Tax Board - Expert Witness**

**Warren, Rhode Island Zoning Board & Town Counsel - Expert Witness**

**State of New Hampshire - Certified Appraisal Supervisor**

**State of Connecticut (Certificate # 95) - Certified Supervisor**

**Resolution Trust Corporation - Qualified to Perform Appraisal Work**

STATE OF CONNECTICUT

Certificate No: 95

Expiration Date: April 30, 2018

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division

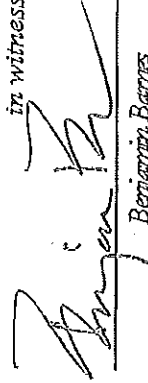
be it known that

**Stephen L. Ferreira**

having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for

Land/Residential  
Commercial/Industrial  
Supervisor

in witness thereof, this certificate is issued by

  
Benjamin Barnes  
Secretary



W. David LeVasseur  
Acting Undersecretary

 **VISION**  
GOVERNMENT SOLUTIONS

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SUSAN ROBINSON

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2006 – Present, Project Manager**

Primary responsibilities are to provide the management of day-to-day appraisal assignments. Constant oversight, planning and organization of individual tasks required to complete revaluation projects. Oversee the delegation of individual tasks to Staff Appraisers and support staff as well as quality control of work and supervision of employees. Handle the coordination of overlapping timelines for sales inspections, field review, permit field work, public notification, informal hearings and municipal deadlines. Work closely with town officials to keep public informed. Review monthly project status reports and periodic valuation progress with assessor. Provide final valuation and state certification documentation at close of project. Projects include Bristol, Berlin, Burlington, Suffield, New Fairfield, Wallingford, Manchester, Middlefield, Middlebury, Wolcott, Ansonia, Danbury, East Haddam, New Britain, and Southbury CT.

**2004 – 2006, Staff Appraiser**

Responsible for hands-on final valuation and review process, completing a full field review on-site of appraisal related data to insure that the property record cards are accurate and the critical data, which is used in the valuation process, is consistently applied among similar properties within the projects. Projects include Stratford, Trumbull, Bridgewater, Brookfield, Middlebury, and Montville, CT. Experience with waterfront properties.

**2003 – 2004, Data Collector**

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. Projects include Lebanon, Manchester, Stratford, Windsor and Wethersfield CT and Longmeadow, MA.

**2000 – 2003, Photographer**

Identify and photograph properties, maintaining quality parameters. Prepare lists for accurate input of photographs to the client database. Effectively interact with property owners and clients. Projects include West Haven, Fairfield, Woodbridge, New Britain, Ansonia, Stamford, Putnam, Sharon, New Fairfield and New Canaan CT and Swanzey, New Hampshire.

**ROBINSON PHOTOGRAPHY, WEST HARTFORD, CT**

**1996 – 2006, Freelance Photographer**

Portrait and event photography. Digital retouching and photo composition.

**ARTEFFECTS INCORPORATED, BLOOMFIELD, CT**

**1983 – 2004, Executive Vice President**

Co-owner of nationally recognized sign design and manufacturing firm. Instrumental in growing company from 2 employees to more than 35 employees. Responsibilities have included sales, design, production, human resources, financial management, and advertising photography.

**OVISION**  
GOVERNMENT SOLUTIONS

**ALLIED PRINTING, MANCHESTER, CT**

**1980 -- 1983, Pre-press Production**

Produce half tones and line film. Maintain high quality while meeting multiple changing deadlines.

**EDUCATION**

**University of CT**

Real Estate Appraisal I, II, and National USPAP

Photography, *School of Visual Arts*, New York, NY (1999-2000)

Art Major, *Central Connecticut State College*, New Britain, CT (1973-1974)

Psychology Major, *Boston University*, Boston, MA (1971-1973)

**CERTIFICATIONS**

**State of Connecticut Certification**

Land/Residential (Certificate No. 840)

Commercial Certification

Supervisor Certification



STATE OF CONNECTICUT

Certificate No: 840

Expiration Date: April 30, 2016

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division

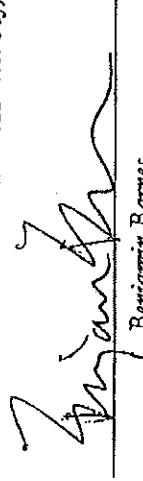
be it known that


**Susan E. Robinson**

having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for

Land/Residential  
Commercial/Industrial  
Supervisor

in witness thereof, this certificate is issued by

  
Benjamin Barnes  
Secretary

  
W. David LeVasseur  
Acting Undersecretary  
Intergovernmental Policy Division

**VISION**  
GOVERNMENT SOLUTIONS

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**BRANDY LANDRIE**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2011 – Present, Project Manager**

Mass Residential and Commercial real estate valuation. Manage of day-to-day appraisal assignments. Plan and organize of revaluation projects. Perform sales inspections, field review, permit fieldwork, and informal hearings. Review project status and periodic valuation progress with assessor. Provide final valuation and state certification documentation at close of project.

**NEW HANOVER COUNTY TAX DEPARTMENT WILMINGTON, NC**

**2008 – 2011, Senior Commercial Real Estate Appraiser**

Mass Residential and Commercial valuation using cost, sales, and income approach to value. Permit inspections, new construction, appraisal review, and sales verification. Appeal support for Board of Equalization and Property Tax Commission. Proficient in GIS, Microsoft Word, Excel, and Access.

**CAPE FEAR REAL ESTATE SOLUTIONS WILMINGTON, NC**

**2007 – 2008, Real Estate Broker**

Real estate sales, contracts, negotiations, and evaluation.

**ERA COVENANT REALTY GROUP, LLC COLUMBIA, CT**

**2002 – 2007, Real Estate Sales Person**

Assist Buyers and Sellers with all aspects of their Real estate needs.

**O'CONNELL APPRAISAL SERVICES, LLC EAST HARTFORD, CT**

**2003 – 2006, Residential Real Estate Appraiser**

Residential appraisal of 1-4 family properties, condominiums, and land.

**EDUCATION**

**Degree in General Studies – MCTC**

**Concentration in Business Administration**

**CT & NC Real Estate Sales Person / Broker License - University of CT**

**CT & NC Residential Real Estate Appraisal Certification**

**Extensive continuing education courses, including MAI courses, and USPAP**

STATE OF CONNECTICUT

Certificate No: 947

Expiration Date: April 30, 2017

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Intergovernmental Policy Division

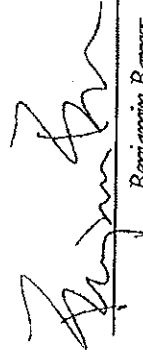
*be it known that*

**Brandy S A. Landrie**

*having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for*

**Land/Residential  
Commercial/Industrial**

*in witness thereof, this certificate is issued by*



Benjamin Barnes  
Secretary



W. David LeVasseur  
Acting Undersecretary

 **VISION**  
GOVERNMENT SOLUTIONS

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JENNIFER GAUTHIER

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2013 – Present, Senior Staff Appraiser**

Responsible for the valuation of commercial properties within contracted municipalities. Analyze income and expense statements, build and test income models, create cost tables and review all commercial properties for fairness and equity. Also responsible to conduct taxpayer appeal hearings, make recommendations and finalize valuations.

**TYLER TECHNOLOGIES, INC.**

**2011 - 2013, Commercial Appraiser Reviewer**

Responsible for the review of commercial properties within Connecticut, Massachusetts, New Jersey and Georgia. Duties included sales research and analysis, property data collection and the creation and calibration of income and cost tables. Applied values and reviewed all for equity and fairness. Conducted residential and commercial appeal hearings and formulated recommendations for valuation action.

**CITY OF WORCESTER, MASSACHUSETTS**

**2010 – 2011, Principal Assistant Assessor**

Utilized Vision CAMA software to record, analyze and equitably value properties within the City of Worcester. Solely responsible for the valuation of all commercial parcels within the city boundaries including, but not limited to, vacant land, industrial properties, office buildings, hotels and retail buildings.

**CITY OF HAMPTON, VIRGINIA**

**2007 – 2010, Appraiser III, Commercial Division**

Performed complex analyses to research, collect, analyze, calculate, and prepare information to derive a fair and equitable appraisal of the value of commercial real estate utilizing ProVal<sup>®</sup> CAMA System.

**EDUCATION**

Eastern Connecticut State University  
Willimantic, Connecticut  
Bachelor of Arts

**CERTIFICATIONS**

Certified Connecticut Revaluation Employee  
Office of Policy and Management  
*Land/Residential* – March, 2012  
*Commercial/Industrial* – March, 2012  
*Supervisor* – March, 2013

STATE OF CONNECTICUT

Certificate No: 948

Expiration Date: April 30, 2017

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division


*be it known that*


**Jennifer L. Migliore**

*having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for*

**Land/Residential  
Commercial/Industrial**

*in witness thereof, this certificate is issued by*

  
Benjamin Barnes  
Secretary

  
W. David LeVasseur  
Acting Undersecretary

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MONIQUE NEWCOMB

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2004 – Present, Residential Staff Appraiser**

Responsible for examination and verification of all items pertaining to land and improvements. Accountable for updating Farm use land lines based on clients' data and resetting condition factors for land based on topography. Processing and reviewing necessary finalization reports to ensure accuracy. Experience in Barre, MA, Andover, East Haddam, Montville, Brookfield, Danbury, Ellington, Glastonbury, Wethersfield, and Coventry CT, Smithfield, RI.

**2002 – 2004, Crew Chief**

Responsible for overseeing the data collection effort and 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, monitoring and evaluation of the data collection personnel. Experience in Cromwell, Glastonbury, Westport, Wethersfield, and Manchester, and Ellington CT.

**2002 – 2004, Residential Data Collector/Hearing Officer**

Responsible for conducting house-by-house inspections for tax revaluation projects. Collected information on the physical aspects of one to four-family residential building including interior layout, construction details and condition, existence of extra features and land items that may add value to the property. Completed a sketch of the building based on exterior measurements showing story height and extent of finished areas.

Required completing all inspections in a timely and professional manner as well as accurately and clearly recording all information collected. Facilitate the hearing process as needed at the close of projects. Experience in Johnston, South Kingstown RI, Danbury, Chester, Lebanon, Plainfield, Glastonbury, Wethersfield, Chester, Essex, Windsor Locks, Stamford CT and Swanzey, NH.

**2002 – 2004, Photographer**

Identify and photograph properties, maintaining quality parameters. Prepare lists for accurate input of photographs to the client database. Effectively interact with property owners and clients. Experience in Claremont, NH and Union, CT.

**EDUCATION**

**Community College of Rhode Island**

Completed various classes in pursuit of a degree in Business

**University Of Connecticut, Center for Professional Development**

Appraisal I - Principles of Residential Valuation

Appraisal II - Principles of Commercial Valuation

**VISION**  
GOVERNMENT SOLUTIONS

**Vision Appraisal Technology, Inc.**  
80 Hours In-Service Training  
**International Association of Assessing Officers**  
Income Approach to Valuation  
**State of Connecticut, Office of Policy and Management**  
Residential/Land Revaluation Certification  
**Appraisal Institute**  
General Appraiser Income Approach, Part I

STATE OF CONNECTICUT

Certificate No: 958

Expiration Date: April 30, 2018

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division


*be it known that*


**Monique L. Newcomb**

*having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for*

**Commercial/Industrial**

*in witness thereof, this certificate is issued by*

  
Benjamin Barnes  
Secretary

  
W. David LeVasseur  
Acting Undersecretary



STATE OF CONNECTICUT

Certificate No: 871

Expiration Date: April 30, 2015

SECRETARY OF THE OFFICE OF POLICY AND MANAGEMENT  
Intergovernmental Policy Division

be it known that

**Monique L. Theroux**

having met the necessary requirements and regulations  
is hereby certified to perform municipal revaluation functions for assessment purposes for

Land/Residential

in witness thereof, this certificate is issued by



Robert L. Genuario  
Secretary



Michael J. Cicchetti  
Acting Undersecretary  
Intergovernmental Policy Division

**VISION**  
GOVERNMENT SOLUTIONS

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**MARY KATE MOODY**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2007 – Present, Crew Chief**

Responsible for overseeing the data collection effort and 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, monitoring and evaluation of the data collection personnel. Experience in Suffield, Burlington, and Branford, CT.

**2006 – 2007, Data Collector**

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. Duties also included Digital Imaging and Updating of information for Building permits. Projects include the Towns of Bristol, Montville, and Bridgeport, CT.

**GENERAL EXPERIENCE**

**LINCOLN APPRAISAL GROUP, PROVIDENCE, RI**

**2004-2006, Provisional Appraiser**

**THOMAS APPRAISAL SERVICES, CHESIRE, CT**

**2001-2004, Staff support/Provisional Appraiser**

**EDUCATION**

**New Haven Board of Realtors: *Appraisal Licensing classes***

**New Haven Board of Realtors: *Real Estate licensing classes***

**Yale New Haven Hospital: *Associates Degree in Science/Radiologic Technologist***

**Vision Appraisal Technology: *80 Hours In-House Training***

**VISION**  
GOVERNMENT SOLUTIONS

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**RICK HULSWIT**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2006 -- Present, Crew Chief**

Responsible for overseeing the data collection effort and 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, monitoring and evaluation of the data collection personnel. Experience in Bristol, Danbury, and New Britain, CT.

**2004 - 2006, Data Collector**

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. Duties also included Digital Imaging and Updating of information for Building permits. Projects include the Towns of Trumbull and Westport, CT.

**EDUCATION**

**Vision Government Solutions 80 hour in house training**

**VISION**  
GOVERNMENT SOLUTIONS

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**ELIZABETH STABLE**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2006 – Present, Data Collector**

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 Bristol, CT; Redding, CT; Cromwell, CT; New Britain, CT; Berlin, CT; Wilton, CT; Suffield, CT; Bridgeport, CT; Danbury, CT; New Hartford, CT; New Fairfield, CT; Brookfield, CT; Middlebury, CT, New Milford, CT, and Oxford, CT.

**GENERAL EXPERIENCE**

**D&L HOME IMPROVEMENTS LLC, DANBURY, CT**

**2005 – 2006, General Construction Manager/Member**

Responsibilities include on site evaluations of needed home improvements and repairs. Prepared and presented estimates to home owners. Responsible for establishing material lists and ordering required supplies. Coordinated work orders, laborers and deliveries to required work sites.

**EDUCATION**

**Chester Institute of Technology - Architectural Drafting and Design  
Vision Appraisal Technology – 80 Hour Training Program**

**VISION**  
GOVERNMENT SOLUTIONS

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**STEPHEN MCCARTY**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2011 – Present, Data Collector**

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. Duties also included Digital Imaging and Updating of information for Building permits. Projects include the Towns of Danbury, Litchfield and Stamford, CT.

**EXPERIENCE**

**2008-2011 United Parcel Service, Milford, CT**  
Warehouse Attendant

**2006-2011 Circle Pix Virtual Tours, West Haven, CT**  
Real Estate Photographer

**2004-2011 The Rinks, Shelton, CT**  
Hockey Instructor/Coordinator

**2005-2007 Saint Joseph High School, Trumbull, CT**  
Girls Varsity Hockey Head Coach

**1995-2004 Mac's Screen Printing and Embroidery, West Haven, CT**  
Owner, Operator, Art and Design Coordinator

**EDUCATION**

**Vision Government Solutions – 80 hour in house training**  
**Graduate of the Sikorsky School of Avionics**  
**Attended Mattatuck Community College**

**VISION**  
GOVERNMENT SOLUTIONS

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**THOMAS ZAGAROLI**

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**PROFESSIONAL EXPERIENCE**

**VISION GOVERNMENT SOLUTIONS, INC., NORTHBORO, MA**

**2012 – Present, Data Collector**

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. Duties also included Digital Imaging and Updating of information for Building permits. Projects include the Towns of Litchfield and Stamford, CT.

**EXPERIENCE**

**2009- 2012 Home Repair, Bridgeport, CT**  
Owner and Operator

**2002-2008 Building Manager, Mamaroneck, NY**  
Apartment Manager

**1976-2002 Peter & Sons Italian Bakery, Mamaroneck, NY**  
Owner and Operator

**EDUCATION**

**Vision Government Solutions – 80 hour in house training**

## **Description of the Vision Team**

Vision is prepared to provide an array of experienced, professional staff to assist with the project. Please note the amount of experience that our staff has using CAMA software, performing mass appraisal projects and supporting values after the project.

**David Arnold:** Currently employed as the Vice President of Appraisal Operations, David is responsible for the overall management and development of all appraisal projects and personnel for the Company. He utilizes his 20 plus years of experience in all facets of Mass Appraisal to train, evaluate and support the Vision Appraisal Staff responsible for the completion of approximately fifty updates, revaluations and appraisal related projects each year.

Mr. Arnold has extensive experience in valuing Residential, Commercial and Industrial properties in Massachusetts, New Hampshire, and Connecticut, and has completed more than 100 projects. Many of those projects have required his expertise in valuing communities with waterfront properties using GIS and high end, multi-million dollar residential properties.

In addition, he continues to contribute to the development of Appraisal Vision software utilizing new technologies, creating product enhancements in response to future appraisal client needs.

Mr. Arnold is considered an Expert Witness for the Massachusetts Appellate Tax Board, the New Hampshire Board of Tax and Land Appeals and in Superior Court in Connecticut. He has appeared in approximately 20 court proceedings.

David is a Certified General Appraiser in both Connecticut and Massachusetts and is certified to perform Mass Appraisal Services in Massachusetts, New Hampshire, Connecticut and Vermont. Mr. Arnold is a certified member of the International Association of Assessing Officers and holds a Bachelors Degree in Business Management from Westfield State College.

**J. Michael Tarello, MAI, ASA, MRA, CMA** has significant experience in mass appraisal valuing Residential, Commercial and Industrial properties in Massachusetts, Maine, New Hampshire, Rhode Island, Connecticut and New Jersey on more than 100 projects. He is currently employed as a District Manager; he has been with Vision since 1987 and previously worked as a Fee Appraiser, Real Estate Sales Person and as a Builder.

Mr. Tarello has a Bachelors Degree in Business Management from the University of Massachusetts and an MBA from Western New England College. He is a Certified General Appraiser in Maine, Massachusetts, New Hampshire and Rhode Island. He is also certified to perform Mass Appraisal Services in Maine, New Hampshire, Connecticut and Vermont. Mr. Tarello is considered an Expert Witness for the Massachusetts Appellate Tax Board and with the New Hampshire Board of Tax and Land Appeals. He has appeared in approximately 20 court proceedings. He has a high level of experience in the conversion of CAMA software products to Vision Appraisal, and in valuing communities with waterfront properties using GIS.

  
GOVERNMENT SOLUTIONS

Below is a list and brief explanation of the organizations that Mr. Tarello is a member of:

**Appraisal Institute-** Designated Member of the Appraisal Institute (MAI). The Appraisal Institute is an international membership association of professional real estate appraisers, with more than 21,000 members and 99 chapters throughout the United States, Canada and abroad. Its mission is to support and advance its members as the choice for real estate solutions and uphold professional credentials, standards of professional practice and ethics consistent with the public good.

**American Society of Appraisers:** Accredited Senior Appraiser (ASA), Designated in Real Property/Urban. The American Society of Appraisers is an organization of appraisal professionals and others interested in the appraisal profession. International in structure, it is self-supporting and independent. The oldest and only major appraisal organization representing all of the disciplines of appraisal specialists, the society originated in 1936 and incorporated in 1952.

**Massachusetts Board of Real Estate Appraisers:** Designated General Appraiser (MRA). The MBREA was founded in 1934 and is one of the largest state-wide organizations in the country.

**International Association of Assessing Officers:** Certified Member. IAAO is the internationally recognized leader and preeminent source for innovation, education, and research in property appraisal, assessment administration, and property tax policy.

**Stephen L. Ferreira, ASA:** Steve has extensive experience in mass appraisal, valuing Residential, Commercial and Industrial properties in Massachusetts, Maine, New Hampshire, Rhode Island, Connecticut and Vermont on more than 200 projects, since 1975. He is currently employed as a District Manager and has been with Vision since 1984. He previously worked as a Senior Appraiser for Municipal Appraisal Service.

Mr. Ferreira has a Bachelor of Arts Degree from Stonehill College. He is certified as a Mass Appraisal Supervisor in the State of Connecticut. Mr. Ferreira has been qualified as an Expert Witness for the Massachusetts Appellate Tax Board, the Superior Court of the State of Rhode Island and the Superior Court of the State of Connecticut. He has appeared successfully in both over-valuation cases and class action suits. He has a high level of experience in the conversion of other CAMA software products to Vision Appraisal, and in valuing high-end waterfront communities.

Below is a list and brief explanation of the organizations that Mr. Ferreira is a member of:

**American Society of Appraisers:** Accredited Senior Appraiser (ASA), Designated in Real Property/Urban. The American Society of Appraisers is an organization of appraisal professionals and others interested in the appraisal profession. International in structure, it is self-supporting and independent. The oldest and only major appraisal organization representing all of the disciplines of appraisal specialists, the society originated in 1936 and incorporated in 1952.

**International Association of Assessing Officers:** Certified Member. IAAO is the internationally recognized leader and preeminent source for innovation, education, and research in property appraisal, assessment administration, and property tax policy.



**VISION**  
GOVERNMENT SOLUTIONS

A list of projects where Steve has worked includes:

**Connecticut**

Branford  
Deep River  
East Lyme  
Hamden  
North Branford  
Old Lyme  
Stonington

**Massachusetts**

Marion  
Millbury  
Taunton  
Sutton  
Yarmouth  
North Attleboro  
Mansfield  
Sharon  
Easton

**Rhode Island**

Cranston  
Little Compton  
Middletown  
Newport  
New Shoreham  
North Kingstown  
Portsmouth  
South Kingstown  
Westerly

**Sue Robinson:** Sue has extensive experience in mass appraisal, valuing residential properties in Connecticut and Massachusetts on more than 16 projects, since 2004. She is currently employed as a Project Manager and has been with Vision since 2000. She previously worked as a Staff Appraiser, Data Collector, and Photographer with Vision Appraisal. Prior to her employment with Vision, Sue was a freelance photographer, and Executive Vice President of ARTeffects, Inc., a nationally recognized sign company.

Sue studied Art and Psychology at Boston University, Central Connecticut State College and the School of Visual Arts. She has taken extensive course work in the real estate field with the University of Connecticut.

Sue has worked on converting from other CAMA systems, used GIS on projects, valued waterfront properties.

A list of projects where Sue has worked includes:

**Connecticut**

Fairfield  
Ansonia  
Berlin  
Bridgewater  
Bristol  
Brookfield  
Burlington  
Lebanon  
Manchester

Middlebury  
Montville  
New Britain  
New Canaan  
New Fairfield  
Putnam  
Redding  
Sharon  
Stamford

Stratford  
Suffield  
Trumbull  
West Haven  
Wethersfield  
Windsor  
Woodbridge

**Massachusetts**

Long Meadow

**VISION**  
GOVERNMENT SOLUTIONS

**Brandy Landrie:** Brandy has extensive experience in real estate and appraisal, valuing residential and commercial properties. She is currently employed as a Project Manager and has been with Vision since 2011. Prior to her employment with Vision, Brandy was a Real Estate Broker for 12 years, a Residential Appraiser for 11 years, and served for three years as a Senior Commercial Staff Appraiser for a large municipality.

Brandy is certified by the State of Connecticut, OPM, for residential and commercial valuation. She received her education from University of Connecticut.

Brandy has worked on converting from other CAMA systems and valued complex commercial and industrial properties.

A list of CT projects where Brandy has worked includes:

Andover	Middlebury
Barkhamsted	Middlefield
Bethlehem	Middletown
Colechester	Montville
Danbury	Newtown
East Haddam	New Hartford
Goshen	Redding
Granby	Roxbury
Lebanon	Seymour
Manchester	Warren

**Jennifer Gauthier:** Jennifer's experience in mass appraisal began as a residential appraiser in a Hampton, Virginia. She was promoted to Commercial Appraiser and worked in that capacity for several years. After relocating to Connecticut, Jennifer worked as the Assistant Assessor for the City of Worcester, Massachusetts and as a Commercial Appraisal Reviewer for Tyler Technologies, a nationally recognized revaluation firm, before joining the Vision Government Solutions team as a Commercial Senior Staff Appraiser earlier this year.

Jennifer received her Revaluation Employee Certification from the State of Connecticut, Office of Policy and Management, for Residential and Commercial properties in 2012 and received her Project Supervisor Certification in 2013.

A list of projects where Jennifer has worked includes:

**VISION**  
GOVERNMENT SOLUTIONS

**Connecticut**

Ashford  
Bethel  
Farmington  
Griswold  
Hartford  
Killingly  
Naugatuck  
Newington  
Plainfield  
Plainville  
Portland  
Sprague  
Sterling  
Woodstock

**Massachusetts**

Northampton  
Peabody

**New Jersey**

East Orange

**Georgia**

Jackson County

Monique Newcomb has experience in mass appraisal, valuing residential properties in Connecticut. She is currently employed as a Staff Appraiser and has been with Vision since 2002.

Monique has taken course work in the real estate field with the University of Connecticut, and has received her Residential certification from the State of Connecticut's Office of Policy and Management.

A list of projects where Monique has worked includes:

Connecticut

Andover  
Bristol  
Coventry  
Cromwell  
Danbury  
Ellington  
Essex  
Glastonbury  
Lebanon  
Manchester  
Marlborough  
Montville  
Redding

Massachusetts

Stamford  
Stratford  
Watertown  
West Haven  
Winchester  
Westport  
Wethersfield  
Windsor  
Windsor Locks

Athol  
Barre  
Longmeadow

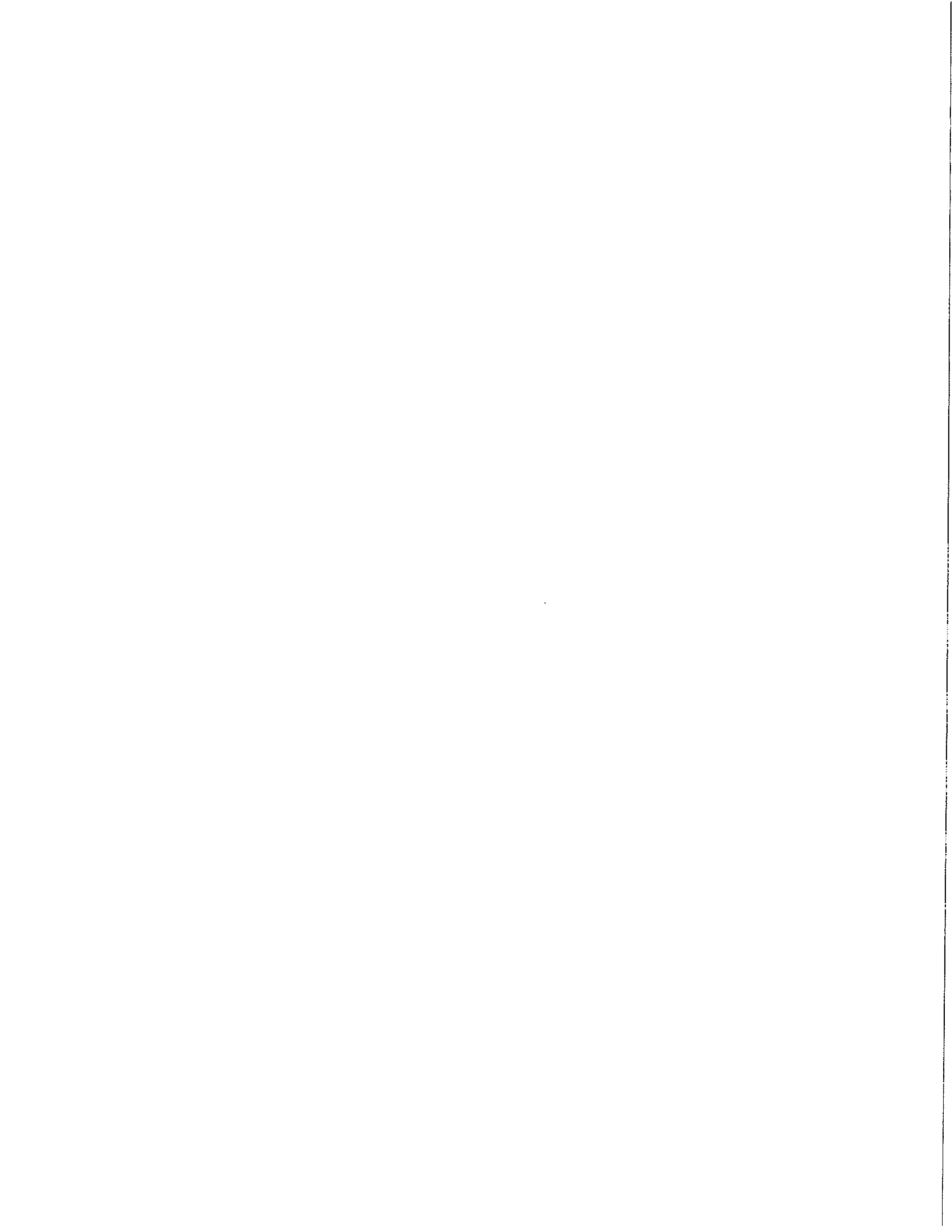
Rhode Island

Johnston  
South Kingstown



**Past Managed Waterfront Revaluation Projects of  
Stephen Ferreira, Vision Government Solutions**

**Branford, CT  
Madison, CT  
Old Lyme, CT  
Stonington, CT  
Westbrook, CT  
Westerly, RI  
Charlestown, RI  
Narragansett, RI  
South Kingstown, RI  
North Kingstown, RI  
Jamestown, RI  
Cranston, RI  
East Providence, RI  
Barrington, RI  
Portsmouth, RI  
Middletown, RI  
Newport, RI  
Warwick, RI  
New Shoreham, RI (Block Island)  
Little Compton, RI  
Westport, MA  
Dartmouth, MA  
Lakeville, MA  
Mattapoissett, MA  
Marion, MA  
Mashpee, MA  
Yarmouth, MA  
Eastham, MA  
Aquinnah, MA (Martha's Vineyard)  
Tisbury, MA (Martha's Vineyard)  
West Tisbury, MA (Martha's Vineyard)  
Oak Bluffs, MA (Martha's Vineyard)  
Edgartown, MA (Martha's Vineyard)  
Nantucket, MA  
Kingston, MA  
Hingham, MA**



**AGREEMENT FOR THE REVALUATION  
OF ALL REAL PROPERTY LOCATED  
WITHIN THE CORPORATE LIMITS OF  
WESTPORT, CONNECTICUT**

This Agreement, made this the \_\_\_\_\_ day of \_\_\_\_\_, 2014, by and between the Town of Westport, a municipal corporation, located in the County of Fairfield, State of Connecticut, hereinafter referred to as the “Town”, acting by and through its First Selectman, having been so duly authorized and Vision Government Solutions, Inc. a Massachusetts Corporation with a principal place of business at 44 Bearfoot Road, Northboro, Massachusetts hereinafter referred to as “Vision”.

**WITNESSETH THAT:**

WHEREAS, the Town, through its Assessor, plans to undertake a revaluation of all real property located within the corporate limits of the Town, for the October 1, 2015 Grand List; and

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

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

**I. CONTRACT DOCUMENTS**

The Agreement shall consist of this Agreement and the terms and conditions of the Request for Proposal number 14-749T dated May 19, 2014 a copy of which is attached as Exhibit A (“RFP”); the Response to the Request for Proposals for RFP 14-749T Assessor Revaluation Proposal dated June 9, 2014, including Clarifications, a copy of which is attached as Exhibit B (the “RFP Response”); and any Addendums thereto, all of which are made a part of this Agreement with the same effect as though fully set forth herein.

Any conflict between the provisions of this Agreement and the RFP Response will be resolved in favor of the provision that provides for a higher standard of obligation by Vision, except in circumstances where Vision has provided a clarification in the RFP Response of such item.

## **II. EMPLOYMENT OF VISION/SCOPE OF WORK**

The Town hereby engages Vision and Vision hereby agrees to perform a Revaluation of all real property, residential and commercial, located within the corporate limits of the Town for the 2015 Grand List, and to perform all the services and furnish all the records, materials, forms, software and supplies required by and in complete accordance with the terms of this Agreement. All such labor, records, materials, forms and supplies to comply with the requirements of the pertinent Connecticut General Statutes and Special Acts, rulings of the Secretary of Office of Policy and Management, ordinances of the Town, and decisions of the courts.

For avoidance of doubt, of the two options listed within the RFP, the Town has selected Option 1.

## **III. COMMENCEMENT AND COMPLETION DATES**

Vision agrees to commence the work no later than two weeks after the signing of this Agreement (or such time as is otherwise agreed to by the Assessor) and shall adhere to the Completion Date and Time Schedule for completion of the Revaluation as set forth in Section III (L) of the General Conditions found on pages 15 and 16 of the RFP. The Town's Assessor may, in his discretion, extend the due dates specified in the Completion Date and Time Schedule by written notice to Vision. **The parties acknowledge that TIME IS OF THE ESSENCE in connection with the performance of work and the delivery of records, materials, forms and supplies by Vision.**

## **IV. COMPENSATION/PAYMENT SCHEDULE**

The Town agrees to pay Vision the total sum of **four hundred and fifty-nine thousand dollars (\$459,000)** as compensation for Vision's services to be performed and the records, materials, forms, reports and supplies to be furnished by Vision. The Town shall pay such compensation subject to the conditions set forth in this Agreement and in accordance with the Payment Schedule set forth in Section III, Paragraph M, of the General Conditions found on page 17 of the RFP.

## **V. TRANSFER, ASSIGNMENT AND SUBLETTING OF CONTRACT**

Vision agrees that it shall not transfer, assign or sublet this Agreement, or any part or interest herein, without first receiving prior written approval from the Town and the bonding company, and agrees that any such assignment or transfer without prior written approval by the Town and bonding company shall not release Vision from any responsibility or liability as set forth in this Agreement and further agrees that such approval by the Town shall not release Vision from any responsibility or liability as set forth in this Agreement.

Nothing contained in this Agreement shall be deemed to create any contractual relationship between any subcontractor and the Town.

## **VI. INDEPENDENT CONTRACTOR**

It is expressly agreed and understood that Vision shall at all times act strictly and exclusively as an independent contractor and shall not be considered under the provisions of this Agreement or otherwise as having any employee status with the Town, or as being entitled to participate in or receive any benefit under any benefit plan or program made available by the Town to its employees. Vision hereby irrevocably waives the right to accrue benefits under any such plan or program even in the event Vision is subsequently reclassified by any court or governmental authority as eligible for such participation. Vision is not granted any right or authority to assume or create any obligation or responsibility, express or implied, on behalf of or in the name of the Town, or to bind the Town to any agreement, contract or arrangement of any nature, except as expressly provided herein. Vision shall be solely and entirely responsible for Vision's acts during the performance of this Agreement.

## **VII. FEDERAL, STATE AND LOCAL LAWS**

All applicable Federal, State and local laws, rules and regulations of all authorities having jurisdiction over the Revaluation project shall apply to this Agreement throughout and are deemed to be included herein. Vision shall also comply with all applicable local, State and Federal anti-discrimination laws, rules and regulations and requirements thereof.

## **VIII. TERMINATION**

1. If Vision fails to perform its obligations under this Agreement in accordance with its terms or if the Town reasonably doubts that Vision's work is progressing in such a manner as to ensure compliance with the Completion Dates and Time Schedule set forth in Section (III), Paragraph (L) of the General Conditions, the Town shall have the right, in addition to all other remedies it may have, upon seven (7) days' written notice to Vision and its surety bonding company, to declare this Agreement in default and thereby terminated, and to award the Revaluation project or the remaining work thereof, to another contractor.
2. In the event the Representative Town Meeting ceases to provide funds for the continuation of payments hereunder, the Agreement shall terminate within thirty (30) days of written notice to Vision without any further obligation on the part of the Town. In the event of such termination, Vision shall be compensated for work performed to the date of such termination.



3. If Vision 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 thirty (30) days, or if Vision shall make an assignment for the benefit of creditors, or otherwise, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt then and forthwith thereafter, the Town shall have the right, at its option and without prejudice to its right, hereunder to terminate this Agreement and withhold any payments due.
4. In the event any material representation or warranty of Vision shall be untrue this Agreement shall be terminated upon seven days prior written notice.

Upon termination Vision's agents and employees shall, at the Assessor's direction, vacate in an orderly fashion the office space provided by the Town, leaving behind all records, properly filed and indexed, as well as other property of the Town. Any funds held by the Town under this Agreement shall become the property of the Town to the extent necessary to reimburse the Town for its costs in obtaining another Vision and supervising the transition. Termination of the Agreement and retention of funds by the Town shall not preclude the Town from bringing an action against Vision for damages (including but not limited to consequential and incidental damages) or exercising any other legal, equitable, or contractual rights the Town may possess in the event of Vision's failure to perform.

## **IX. REPRESENTATIONS AND WARRANTIES OF THE PARTIES**

Vision represents, warrants and covenants to the Town as follows:

1. Organization, Powers and Qualifications. Vision is a corporation duly organized, validly existing and in good standing under the laws of the State of Massachusetts; it has all requisite corporate power and authority to own its properties and assets and carry on its business as now conducted.
2. Experience in Revaluation and Appraisal of Real Property. Vision is experienced and qualified to carry on the work of appraising real property, including but not limited to residential and commercial real property, in municipalities similar to Westport and a substantial portion of its business activities have been related to such work. Vision is familiar with recognized Connecticut appraisal practices and with the standards required for determining ad valorem values of all forms of real property, including but not limited to residential and commercial real property for assessment purposes. It has successfully conducted town-wide revaluations of all forms of real property in the State of Connecticut in municipalities similar to Westport and is adequately staffed with qualified individuals to fulfill its obligations under the terms of this Contract.
3. Due Execution. This Agreement and the other agreements and instruments to be

executed and delivered by Vision pursuant hereto have been duly executed and delivered by Vision and constitute valid and binding obligations of Vision enforceable in accordance with their respective terms, except as the enforceability hereof or thereof may be limited by bankruptcy, insolvency or similar laws affecting creditors' rights generally or by general principles of equity (whether considered in a suit at law or in equity).

4. Conflict with Other Agreements, Approvals. The execution, delivery, and performance of this Agreement by Vision does not (a) violate any applicable provision of any law, statute, rule or regulation or any judgment, order, injunction, decree or ruling of any court or governmental authority applicable to Vision (b) violate or conflict with, or permit the cancellation of, or constitute a default under, any contract to which Vision is a party, or (c) require any consent, approval or authorization of, or notice to, or declaration, filing or registration with, any governmental authority or other third party.
5. Compliance with Law. Vision and its use and occupancy of its assets and properties wherever located is and has been in compliance in all material respects with all applicable laws, regulations, judgments, orders and other requirements of all courts, administrative agencies, or governmental authorities, foreign or domestic, having jurisdiction over Vision or its properties and has not received any claim or notice of violation with respect thereto.
6. Licenses. Vision owns or possesses all certifications, licenses, certificates, permits, consents, approvals, waivers, and all authorizations, governmental or otherwise, required for the conduct of its business as now conducted and proposed to be conducted (the "Licenses"). All such Licenses are valid and in effect. Vision is not in violation of any License, nor has it received any notice of any claim, violation, proceeding or threatened proceeding relating to any such License or claimed lack of any necessary License. Neither the execution nor delivery of this Agreement nor the consummation of the transactions contemplated hereby will have a materially adverse effect upon or with respect to any License.
7. Litigation. (a) No claim, action, suit, arbitration, investigation or other proceeding is pending, or, to Vision's best knowledge, threatened, against it before any court, governmental agency, authority or commission, arbitrator or "impartial mediator" and there are no facts or events or occurrences by reason of which any such action or proceeding may be brought; (b) there are no judgments, consent decrees, injunctions, or any other judicial or administrative mandates outstanding against Vision which materially and adversely affect its ability to perform its obligations under this Contract and (c) no litigation has been brought or, to Vision's best knowledge, threatened respecting the transactions contemplated by this Agreement.

8. Disclosure. No representation or warranty made by Vision in this Agreement contains or will contain any untrue statement of material fact or omits or will omit to state any material fact necessary to make the statements contained herein or therein not misleading. There is no fact known to Vision which presently materially and adversely affects its ability to perform its obligations under this Agreement which has not been disclosed to the Town.

The Town represents, warrants and covenants to Vision as follows:

1. Organization and Good Standing. The Town is a municipal corporation duly organized, validly existing and in good standing under the laws of the State of Connecticut; it has all requisite corporate power and authority to own its properties and assets and carry on its business as now conducted.
2. Authority. The Town has full power and authority to execute and deliver this Agreement and to carry out the transactions contemplated hereby. The execution and delivery of this Agreement and the consummation of the transactions contemplated hereby have been duly authorized by all necessary elected bodies of the Town. This Agreement has been duly executed and delivered by the Town and constitutes a valid and binding obligation of the Town enforceable in accordance with its terms, except to the extent that such enforcement may be subject to bankruptcy, insolvency, reorganization, moratorium or other similar laws relating to creditors' rights.
3. Conflict with Other Agreements, Approvals. The execution, delivery, and performance of this Agreement by the Town does not (a) violate any applicable provision of any law, statute, rule or regulation or to the best of its judgment, any judgment, order, injunction, decree or ruling of any court or governmental authority applicable to the Town or (b) to the best of its knowledge violate or conflict with, or permit the cancellation of, or constitute a default under, any contract to which the Town is a party or by which it or any of its property is bound.

## **X. MISCELLANEOUS**

1. Notices. Any notices or demands required or permitted by law, or by any provision of this Agreement shall be in writing, and may be delivered personally, by reputable private delivery service, or by the United States mail, registered or certified, return receipt requested and postage prepaid. If to Vision, notices should be addressed to Vision Government Solutions, Inc. Attn: Jay Taranto, 44 Bearfoot Road, Northboro, MA 01532. If to the Town, notices should be addressed to Town of Westport, Attn: First Selectman, 110 Myrtle Avenue, Westport, CT 06880 with a copy to Town Assessor, 110 Myrtle Avenue,

Westport, CT 06880. Notices shall be effective when delivery is made during regular business hours.

2. **Governing Law.** This Agreement shall be interpreted and enforced according to the laws of the State of Connecticut.
3. **Successors; Third Party Beneficiaries.** This Agreement shall be binding upon and inure solely to the benefit of the parties and their heirs, successors and permitted assigns, and nothing herein, express or implied, is intended to or shall confer upon any other person any legal or equitable right, benefit or remedy of any nature whatsoever.
4. **Waiver.** No waiver of any provisions of this Agreement shall be effective unless made in writing and signed by the waiving party. No waiver of any provision of this Agreement shall constitute a waiver of any prior, concurrent or subsequent breach of the same or any other provisions hereof.
5. **Severability.** If any provision of this Agreement or the application thereof becomes or is declared by a court of competent jurisdiction to be illegal, void or unenforceable, the remainder of this Agreement shall continue in full force and effect, and the parties shall use best efforts to replace such void or unenforceable provision of this Agreement with a valid and enforceable provision that will achieve, to the extent possible, the economic, business and other purposes of such void or unenforceable provision.
6. **Entire Agreement; Amendment.** This Contract, contains the complete and exclusive statement of the agreements and understandings of the parties, and supersede all prior agreements, understandings, communications or proposals, oral or written, relating to the subject matter of this Agreement. This Contract may not be amended or modified except by written instrument duly executed by the parties.
7. **Interpretation.** The terms and provisions of this Contract shall be construed fairly in accordance with their plain meaning, regardless of which party was responsible for the drafting of such terms and provisions.

IN WITNESS HEREOF The Town of Westport and \_\_\_\_\_ have executed this Agreement on the date first written above by their duly authorized officers.

**IN THE PRESENCE OF:**

\_\_\_\_\_  
\_\_\_\_\_

**TOWN OF WESTPORT**

By: \_\_\_\_\_

James S. Marpe  
First Selectman

**VISION GOVERNMENT SOLUTIONS, INC**

By: \_\_\_\_\_

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