TOWN OF GLASTONBURY PROFESSIONAL SERVICES PROCUREMENT NOTICE REQUEST FOR PROPOSAL REVALUATION SERVICES RPGL-2016-13

The Town of Glastonbury will be accepting proposals from qualified individuals or firms to provide Revaluation Services.

Interested individuals and firms can download the proposal instructions and details from the Town's website at www.glastonbury-ct.gov or request them from the Purchasing Agent, 2155 Main Street, Glastonbury, CT 06033.

Responses to the proposal must be submitted to the Purchasing Agent no later than 11:00 A.M. on January 28, 2016. LATE PROPOSALS WILL NOT BE CONSIDERED.

The Town of Glastonbury is an Affirmative Action/Equal Opportunity Employer. Minority / Women / Disadvantaged Business Enterprises are encouraged to submit a proposal.

Mary F. Visone Purchasing Agent

TOWN OF GLASTONBURY PROFESSIONAL SERVICES PROCUREMENT NOTICE REVALUATION SERVICES RPGL-2016-13

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TOWN OF GLASTONBURY PROFESSIONAL SERVICES PROCUREMENT REVALUATION SERVICES

SECTION I. GENERAL INFORMATION

1. INTRODUCTION

The Town of Glastonbury is soliciting a Request for Proposal (RFP) for the revaluation of all real estate in the town in accordance with §12-62 of the Connecticut General Statutes.

The Town's last revaluation was completed for the October 1, 2012 grand list. The 2012 revaluation included the inspection of 2,000 preselected residential parcels, all commercial, industrial properties, and all sales for the 18 month period prior to the revaluation date. The appraisals were performed utilizing Vision Appraisal CAMA Software 6.5. The Town will engage a certified revaluation company to assist with updating assessments to reflect 70% of October 1, 2017 market value utilizing Vision 6.5, to insure the accuracy of the property data used in determining these assessments, and to comply with the physical inspection provision contained in Connecticut General Statutes §12-62 (2).

2. MINIMUM REQUIREMENTS

To be considered, interested firms and individuals must be a certified revaluation company in accordance with Connecticut General Statutes §12-2b-2, and must have held this certification for a minimum of five years.

All personnel to be assigned to this project shall be subject to the approval of the Assessor and shall be certified in accordance with Connecticut General Statutes §12-2b-6. In addition, the positions identified below must meet the following additional requirements:

The Project Manager assigned to this project must have not less than five (5) years of practical appraisal experience in the appraisal of commercial, industrial, apartment, farm and residential type properties.

{tc \l4 "Reviewers and Appraisers}Reviewers and appraisers shall have not less than three (3) years of practical appraisal experience in the appraisal of the particular type of properties for which they are responsible. Two years of this experience shall have been in the mass appraisal field and shall have occurred within the past five years.

{tc \l4 "Measurers and Listers}Data Collectors shall have not less than six (6) months of experience and training in this phase of the revaluation project. Any field person who does not meet the above qualifications must work under the direct supervision of an appraiser or project supervisor.

3. TERM OF SERVICE

The selected Revaluation Firm or individual will be expected to commence services on or about May 2, 2016 subject to contract execution. The term of the contract is expected to extend until the completion of the Board of Assessment Appeal hearings related to the October 1, 2017 revaluation project (approximately April 30, 2018).

SECTION II SCOPE OF SERVICES

1. SPECIFIC SERVICES

While the exact scope of services is subject to negotiation, the selected firm or individual for revaluation services is expected to provide the general professional services and dedicated personnel to perform the following:

- Assist the Town Assessor in making the complete reappraisal and revaluation of all taxable and non-taxable real property within the corporate limits of the Town of Glastonbury (see Attachment C for a breakdown of accounts).
- Complete all appraisal calculations and maintain all computerized assessment records utilizing Vision Appraisal Software version 6.5.
- Perform all the services and furnish all the records, materials, and forms required to complete the revaluation project in accordance with Connecticut General Statutes.
- Conduct presentations directed to taxpayers, local officials and civic groups to improve understanding of the scope and objectives of the project
- Perform physical inspections in accordance with C.G.S. 12-62(2). See Attachment D for interior inspection options.
- Measure and list all properties with open building permits through October 1, 2017.
- Prepare and mail data mailers to all residential property owners not subject to the interior inspection provision.
- Take digital images of 500 properties selected by the Assessor.
- Verify all residential sales transactions which occur between April 1, 2016 and October 1, 2017 through physical inspections and take a digital image of each sale property at the time of the inspection. It is expected that these inspections will occur on a monthly basis.
- Verify all commercial transactions which have occurred since October 1, 2012 through October 1, 2017 through physical inspection or through a sales questionnaire.
- Prepare and mail income and expense surveys (unless already completed by Assessor) to all commercial and industrial property owners for both the 2015 and 2016 calendar years, and input this information in the CAMA program.
- Prepare and mail assessment notices of proposed new value.
- Hold informal hearings so the property owners may discuss the manner and methods for arriving at the market value determined through the revaluation process.
- Provide public access online to updated assessment records during the informal hearings period through July 31, 2018.

2. CURRENT PROGRAM

The Town's current assessment database was originally established for the October 1, 2012 revaluation, and is maintained using Vision Appraisal CAMA Software 6.5. The 2012 revaluation included the inspection of all commercial/industrial properties, 2000 residential properties and all properties which sold in the 18 month period prior to October 1, 2012. The digital images included in the 2012 data base are primarily images taken for the 2002 town wide revaluation. A breakdown of parcel information and current sale and sale ratio information related to the current assessment system is included in Attachments C and F.

The computer network configuration for the Town's Assessor department consists of a Windows 2008 based virtual server with six Windows 7 based staff workstations and three Windows XP based workstations for public access in the Town Hall facility. The department utilizes HP laser printers for hard copy output. The systems are integrated via a 1 Gigabit Ethernet network and utilize Active Directory services for network authentication. The assessment administration system used to bridge assessment information to the collection system is Quality Data Systems 3.0.627.

The assessment mapping system is maintained by the Glastonbury Engineering Department. The planimetric information included on the assessment maps is based on 2014 aerial photos. The Town maintains a G.I.S. system using ArcInfo and, ArcGIS software (version 9.3x & 10.0) in a GEO-Database format; and this information is integrated with the Vision Appraisal CAMA Software.

3. <u>INSURANCE</u>

The Respondent shall, at its own expense and cost, obtain and keep in force during the entire duration of the contract the following insurance coverages covering the Respondent and all of its agents, employees and sub-contractors and other providers of services and shall name the Town of Glastonbury and its employees and agents as an Additional Insured on a primary and non-contributory basis to all policies except Workers Compensation and Professional Liability. All policies should also include a Waiver of Subrogation in favor of the Town. These requirements shall be clearly stated in the remarks section on the Respondent's Certificate of Insurance. Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best's Rating of A-VIII. In addition, all carriers are subject to approval by the Town. Minimum Limits and requirements are stated below:

1) Worker's Compensation Insurance:

- Statutory Coverage
- Employer's Liability
- \$500,000 each accident/\$500,000 disease-policy limit/\$500,000 disease each employee
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents

2) Commercial General Liability:

- Including Premises & Operations, Products and Completed Operations, Personal and Advertising Injury, Contractual Liability and Independent Contractors.
- Limits of Liability for Bodily Injury and Building Damage Each Occurrence \$1,000,000
 - Aggregate \$2,000,000 (The Aggregate Limit shall apply separately to each job.)
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents

3) Automobile Insurance:

- Including any vehicles, hired, borrowed and non-owned vehicles
- Evidence a Combined Single Limit of Liability for Bodily Injury and Property Damage:
 - Per Accident \$1,000,000
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents

4) Umbrella (Excess Liability):

- \$1,000,000 Occurrence/\$1,000,000 Aggregate
- Umbrella/Excess Shall be Workers Compensation, General Liability, and Auto Liability.

5) Professional Liability:

- \$2,000,000 Each Claim/\$2,000,000 Aggregate

The limits and coverage listed above are minimums and additional limits and/or coverage may be required by the Town depending on the event.

The Respondent shall direct its Insurer to provide original, completed Certificates of Insurance to the Town prior to issuance of contract. The awarded Respondent(s) will be responsible to provide written notice to the Town 60 days prior to cancellation or non-renewal of any insurance policy. The Certificate shall evidence all required coverage's including the Additional Insured on the General Liability, and Auto Liability policies, Waiver of Subrogation on the General Liability policy, Auto Liability and Workers Compensation policies and that Excess/Umbrella is Follow Form over Workers Compensation, General Liability, Auto Liability. The Respondent shall provide the Town copies of any such insurance policies upon request.

Indemnification

To the fullest extent permitted by law, the Respondent shall indemnify and hold harmless the Town and its consultants, agents, and employees from and against all claims, damages, losses and expenses, direct, indirect or consequential (including but not limited to fees and charges of engineers, attorneys and other professionals and court and arbitration costs) to the extent arising out of or resulting from the performance of the Respondent's work, provided that such claim, damage, loss or expense is caused in whole

or in part by any negligent act or omission by the Respondent, or breach of its obligations herein or by any person or organization directly or indirectly employed or engaged by the Respondent to perform or furnish either of the services, or anyone for whose acts the Respondent may be liable.

SECTION III SUBMISSION OF PROPOSAL

1. PROPOSAL INSTRUCTIONS

By submitting a proposal, you represent that you have thoroughly examined and become familiar with the scope of services outlined in this RFP and you are capable of performing the work to achieve the Town's objectives.

All firms are required to submit:

- A <u>clearly marked</u> original and seven (7) copies of their technical proposal
- · A <u>clearly marked</u> original and two (2) copies of the preliminary fee proposal

Proposals shall be submitted in separate sealed packages clearly marked "Technical Proposal" and "Preliminary Fee Proposal" to Mary F. Visone, Purchasing Agent, 2155 Main Street, Glastonbury, CT by **January 28, 2016 at 11:00 A.M.** All technical proposals will be opened publicly and recorded as received. Respondents may be present at the opening; however, there will be no public reading of Proposals. Proposals received later than the time and date specified will not be considered. The proposal must be submitted in a sealed envelope or package and the outside shall be clearly marked with the Respondent's Company Name, Address and the following:

SEALED REQUEST FOR PROPOSAL PROFESSIONAL SERVICES PROCUREMENT NOTICE REVALUATION SERVICES RPGL-2016-13 DATE - January 28, 2016 TIME- 11:00 A.M.

ENVELOPE #1 - TECHNICAL PROPOSAL ENVELOPE #2 – PRELIMINARY FEE PROPOSAL

All respondents are required to submit the information detailed below. **Responses shall be organized and presented in the order listed below to assist the Town in reviewing and rating proposals.** Responses should be presented in appropriate detail to thoroughly respond to the requirements and expected services described herein.

Technical Proposal Instructions:

- a. Table of Contents to include clear identification of the material provided by section and number.
- b. A letter of transmittal indicating the firm's interest in providing the service and any other information that would assist the Town in making a selection. This letter must be signed by a person legally authorized to bind the firm to a contract. This letter also

must affirm that the firm or their representative has visited the Town of Glastonbury, is familiar with its geography, general character of housing and its commercial and industrial area, 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 which would influence this Proposal.

- c. Name and telephone number of person(s) to be contacted for further information or clarification.
- d. A background and qualifications statement, including description and history of your firm and the servicing office, number of professional employees, years in business and technical qualifications. Respondents shall specifically address all of the minimum requirements identified in Section I, No. 2. Firms must meet all of these minimum requirements to be given consideration.
- e. Copy of the respondent's Connecticut Revaluation Company Certificates covering the previous five year period.
- f. List of all Connecticut municipal revaluations completed during the preceding five (5) years including: client contact, telephone number, and number of properties appraised within the municipality, CAMA software and the version utilized, scope of services provided and date completed. The Town reserves the right to contact these organizations regarding the services performed by the firm.
- g. List of all Connecticut municipalities for which the respondent is currently under contract for performing revaluation services. Include size of municipality, scope of services, and a time table for completion of these contracts.
- h. List of all company personnel certified to perform revaluation services in Connecticut and list their level of certification.
- i. List of personnel to be assigned to this project, including years of experience in their current position, municipalities served and their roles in those revaluations. Please provide their resumes, revaluation certificates, and document the chain of command for these individuals. A listing of concurrent projects that the employees will be assigned to must be identified.
- j. Detailed project work plan with suggested dates for completion of major phases of the revaluation project.
- k. A statement indicating the amount the company will bill the town for a "competent" witness as defined in the contract specifications per person day and per one-half person day for pre-trial meetings with an attorney representing the town or for court/appeal board appearances.
- 1. Description and examples of the respondent's public relations program to be used during the revaluation.
- m. Copy of a sample appraisal manual which includes definitions of data items, grades, etc.
- n. Sample of data mailer(s) used by the respondent and recommended for Glastonbury.

- o. A concluding statement as to why the respondent is best qualified to meet the needs of the Town.
- p. Copy of the respondent's Certified Audited Financial Statements for the past three (3) fiscal years.
- q. Proposal Response Page (Attachment A).
- r. Signed Non-Collusion Statement (Attachment B).
- s. Respondent is required to review the Town of Glastonbury Code of Ethics adopted October 22, 2013 and effective November 8, 2013 and revised October 29, 2013 and effective November 28, 2013. Respondent shall acknowledge that they have reviewed the document in the area provided on the bid/proposal response page (BP). The selected Respondent will also be required to complete and sign an Acknowledgement Form prior to award. The Code of Ethics and the Advisor Acknowledgement Form can be accessed at the Town of Glastonbury website at www.glastonbury-ct.gov. Upon entering the website click on Bids & Proposals, which will bring you to the links for the Code of Ethics and the Advisor Acknowledgement Form. If the Respondent does not have access to the internet a copy of these documents can be obtained through the Purchasing Department at the address listed within this bid/proposal.
- t. A 100% Performance and Payment bonds are required of the successful respondent upon execution of an agreement with the Town. This bond shall cover all aspects of the specification and shall be delivered to the Purchasing Agent prior to the issuance of a purchase order. The Performance and Payment Bonds will be returned upon the delivery and acceptance of the contracted services.
- u. Any technical questions regarding this RFP shall be made in writing and directed to Nicole Lintereur, Assessor, 2155 Main Street, PO Box 6523, Glastonbury, CT 06033 or email nicole.lintereur@glastonbury-ct.gov. For administrative questions concerning this proposal, please contact Mary F. Visone, Purchasing Agent email purchasing@glastonbury-ct.gov. All questions, answers, and/or addenda, as applicable, will be posted on the Town's website at www.glastonbury-ct.gov (Upon entering the website click on Bids & Proposals icon, click on the Bid Title to view all proposal details and document links). It is the respondent's responsibility to check the website for addenda prior to submission of any proposal.

Note: Responses to requests for more specific contract information that is contained in the RFP shall be limited to information that is available to all offerors and that is necessary to complete this process. The request must be received at least five (5) business days prior to the advertised response deadline.

No other Glastonbury Town employee, elected official, or evaluation committee member should be contacted concerning this RFP during the proposal process. Failure to comply with this requirement may result in disqualification.

Failure to include any of the above-referenced items in the submitted proposal may be grounds for disqualifying said proposal.

v. The Town of Glastonbury is dedicated to waste reduction and the practice of using and promoting the use of recycled and environmentally preferable products. Respondents are encouraged to submit RFP responses that are printed double-sided (except for the signed proposal page) on recycled paper, and to use paper dividers to organize the RFP for review. All proposal pages should be secured with a binder clip, staple or elastic band, and shall not be submitted in plastic binders or covers, nor shall the proposal contain any plastic inserts or pages. We appreciate your efforts towards a greener environment.

Preliminary Fee Proposal Instructions:

a. Respondent shall submit as a separate package a preliminary fee proposal (Attachment E) based on the inspection options defined in Attachment D.

2. EVALUATION CRITERIA

- The Town of Glastonbury shall select the responsible and responsive Proposal which is determined by the Town to be the best suited, most advantageous, and provides the best value to the Town on the basis of the criteria included in this Request for Proposal. The Town expressly reserves the right to negotiate with the selected Proposer prior to an award of any contract pursuant to this RFP. Best value shall be determined by consideration of some or all of the following factors as deemed appropriate by the Town.
 - Accuracy, overall quality, thoroughness, and responsiveness to the Town's requirements as summarized herein.
 - The qualifications and experience of the firm, the designated account representative, and other key personnel to be assigned to the project including the minimum requirements identified in section I.2.
 - Schedule as stated in proposal instructions under letter "j".
 - The number, scope, and significance of conditions or exceptions attached or contained in the proposal.
 - Preliminary Fee Proposal will not be a consideration in the initial selection committee process it however will serve to expedite the negotiation process.

3. SELECTION PROCESS

• This request for proposal does not commit the Town of Glastonbury to award a contract or to pay any costs incurred in the preparation of a proposal to this request. All proposals submitted in response to this request become the property of the Town of Glastonbury. The Town of Glastonbury reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with the selected respondents, the right to extend the contract for an additional period or to cancel in part or in its entirety the request for proposals, if it is in the best interests of the Town to do so.

- A Selection Committee, appointed by the Town Manager, will evaluate all proposals received for completeness and the respondent's ability to meet all requirements as outlined in this RFP.
- Following review and evaluation of proposals, the Town reserves the right to request certain additional information. Based on review and rating of proposals, if determined to be necessary, a short list of respondents may be invited to interview with the Town Selection Committee. Interviews are at the option of the evaluation committee and may or may not be conducted.
- Based on the results of the interview process, the Town Manager will review the Scope of Services, fee proposals, and other factors with the top-rated firm(s) and negotiate a specific agreement based on these discussions.

4. TIMELINE

Below is the Town's timeline. The Town intends to adhere to this schedule as closely as possible but reserves the right to modify the schedule in the best interest of the Town as required.

Publicize RFP	Date – January 5, 2016
RFP Due Date	Date – January 28, 2016 @ 11AM
Interviews with Top Respondents	Date – During March, 2016
Fee Proposal and Scope of Services	Date – April 14, 2016

TOWN OF GLASTONBURY * 2155 MAIN STREET * GLASTONBURY * CT

ATTACHMENT A PROPOSAL RESPONSE PAGE

BID / PROPOSAL NO:	RPGL-2016-13	DATE DUE:	<u>01-28-16</u>	
DATE ADVERTISED:	<u>01-05-16</u>	TIME DUE:	<u>11:00 AM</u>	
NAME OF PROJECT:	REVALUATION	SERVICES		
The undersigned RESPON	DENT affirms and de	eclares:		
The Respondent acknowled	lges receipt of the foll	lowing Addenda:		
Addendum #1(Initial	/Date) Addendum #2	(Initial/Date) Adden	dum #3(Initial/Da	ate
It is the responsibility of before submitting the prop	-	neck the Town's web	site for any Addenda	
CODE OF ETHICS: I / We have reviewed a copy of Consultant Acknowledgemen				
*Respondent is advised that e proposal where the responder		•	ıry cannot consider any	
Type or Print Name of Indivi	dual Do	oing Business as (Trade	Name)	
Signature of Individual	St	reet Address		
Title	Ci	ity, State, Zip Code		
Date	To	elephone Number / Fax	Number	
E-Mail Address		S#orTIN#		

ATTACHMENT B

TOWN OF GLASTONBURY PROFESSIONAL SERVICES PROCUREMENT NOTICE REQUEST FOR PROPOSAL REVALUATION SERVICES RPGL-2016-13

NON-COLLUSION STATEMENT

The company submitting this proposal for the revaluation certifies that it is being submitted without any collusion, communication or agreement as to any matter relating to it with any other respondent or competitor. We understand that this proposal must be signed by an authorized agent of our company to constitute a valid proposal.

Date:	
Name of Company:	
Name and Title of Agent	
By (SIGNATURE):	
Address:	
Telephone Number:	

ATTACHMENT C

PARCEL INFORMATION

The table below identifies the composition of the taxable real estate grand list by major property classifications (as of September 1, 2015):

CLASSIFICATION	# OF	% OF	
	ACCOUNTS	TOTAL	
RESIDENTIAL			
Single family - Includes Pad & In-Law	10,004	69.0%	
Condominiums - Includes Declared Garages	2028	14.0%	
Multi-family - 2 To 4 Units	239	1.6%	
Vacant	777	5.4%	
TOTAL RESIDENTIAL	13,048		
COMMERCIAL/ INDUSTRIAL AND SPECIAL USE			
Apartments	9	0.1%	
Commercial Buildings	282	1.9%	
Condominiums - Commercial/Industrial	154	1.9%	
Industrial / Public Utility Buildings	133	0.9%	
Vacant - Com./Ind./Public Utility	69	0.5%	
P.A. 490 - Farm & Forest	266	1.8%	
Tax Exempt – Improved & Vacant	539	3.7%	
TOTAL COMM/IND/SPECIAL USE	1452		
TOTAL PARCELS	14,500	100.0%	

ATTACHMENT D

PHYSICAL INSPECTION OPTIONS

The selected firm will be responsible for performing physical inspections of the taxable real estate in the Town. The physical inspection primarily will involve interior inspections performed in accordance with guidelines determined by the Assessor and in accordance with C.G.S. §12-62(2). It is anticipated that a small sample of exterior measurements will be a part of the inspection program. The selected company will issue letters to all property owners requesting appointments for inspecting their properties. The selected firm will verify or correct the inventory of each property's physical details through the inspection process or through information gathered through data mailers.

Inspections -The TOWN will select one of four options for determining the properties to be subject to an interior inspection by the selected firm.

- **A.** All Sales with Limited Residential and Commercial Inspection option the selected firm will be responsible for making every reasonable effort to make interior inspections of all properties which sell between July 1, 2016 and October 1, 2017, an additional **3000** residential properties selected by the ASSESSOR, and **200** commercial /industrial properties selected by the ASSESSOR.
- **B.** All Sales and Limited Residential Inspection Option the selected firm will be responsible for making interior inspections of all properties which sell between July 1, 2016 and October 1, 2017 and an additional **3000** residential properties selected by the ASSESSOR.
- C. All Commercial Sales and Limited Commercial Inspection Option the selected firm will be responsible for making inspections of all commercial/industrial properties which sell between July 1, 2016 and October 1, 2017, and an additional 200 commercial/industrial properties selected by the ASSESSOR. Included in this option is the updating of the Income Valuation module (Economic & Actual Income) for all commercial properties.
- D. **Additional Inspections Option** the fee for each additional interior inspection the assessor requests the selected firm to make over and above the previous 3 options.

ATTACHMENT E

PRELIMINARY FEE PROPOSAL

To be submitted on your firm's letterhead in a separate sealed envelope.

That the Respondent proposes to furnish their services and materials required to complete the subject project in accordance with the aforesaid specifications for the following preliminary estimated fee for the Option as on Attachment D:

A.	All sales and Limited Res. And Comm./Ind. C	1	Numeric Amount
	\$Written Dollar Amount		
B.	All sales & Limited Res. Inspection Option		\$ Numeric Amount
	\$Written Dollar Amount		
C.	All Commercial Sales & Limited Inspection (-	\$ Numeric Amount
	\$ Written Dollar Amount		
D.	Additional Inspections Option per each		\$ Numeric Amount
	\$Written Dollar Amount		
Subn	nitted by	Date	
Signa	ature	Title	
Tele	phone	Fax	

ATTACHMENT F

SALES AND SALE RATIO INFORMATION

Current assessment and sale price statistics compiled by the Assessor's Office for the period of October 1, 2014 through September 30, 2015 are as follows:

Total Real Estate Sales	607
Total "Useable" Sales	535
Median Sales Ratio – all useable sales (100% value)	94.9 %
Coefficient of Dispersion – all useable sales	11.5
Total Residential – Useable Sales	519
Median Selling Price – Residential	\$ 320,000
Minimum Sale price – Residential	\$ 84,000
Maximum Sale price – Residential	\$ 2,075,000
Median Sales ratio – Residential (100% value)	93.85 %
Coefficient of Dispersion – All Residential	9.26 %
Median Size- Single Family Detached (Sold)	2,211
Median Size – Residential Condominiums (Sold)	1,344
Median Year Built - All Residential (Sold)	1980
Median Year Built – All Residential	1975