TOWN OF GLASTONBURY PROFESSIONAL SERVICES PROCUREMENT NOTICE REQUEST FOR PROPOSAL REVALUATION SERVICES RPGL-2022-01

DUE DATE AND TIME: May 11, 2021 by 11:00 AM

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

Interested individuals and firms should obtain the complete RFP and related information from the Town's website at <u>www.glastonburyct.gov</u>. Responses to the Proposal must be submitted electronically no later than the time and date indicated above. **LATE PROPOSALS WILL NOT BE CONSIDERED**.

Responses can be submitted at the following link: <u>https://app.negometrix.com/buyer/2832</u>, under the RFP title "*RPGL-2022-01 – Revaluation Services*". Respondents will be required to create a profile before submitting their proposal. Step-by-step instructions on how to register as a vendor are available at this website:

https://help.negometrix.com/en/support/solutions/articles/9000177626-register-on-negometrix4

The Town reserves the right to waive informalities or reject any part of, or the entire proposal, when said action is deemed to be in the best interests of the Town.

An Affirmative Action/Equal Opportunity Employer. Minority/Women/Disadvantaged Business Enterprises are encouraged to submit a proposal.

Mary F. Visone Purchasing Agent

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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, 2017 grand list. The 2017 revaluation included the inspection of 3,000 preselected residential parcels, all commercial, industrial properties, and all sales for the 18 month period prior to the revaluation date. The Town will engage a certified revaluation company to assist with updating assessments to reflect 70% of October 1, 2022 market value utilizing Vision 8, 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:

- <u>The Project Manager</u> 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.
- **<u>Reviewers and appraisers</u>** 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.
- **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.

<u>3. TERM OF SERVICE</u>

The selected Revaluation Firm or individual will be expected to commence services on or about August 2, 2021 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, 2022 revaluation project (approximately April 30, 2023).

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 8.2.
- 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, 2022.
- Prepare and mail data mailers to all residential property owners not subject to the interior inspection provision.
- Take digital images of 1,500 properties selected by the Assessor.
- Verify all residential sales transactions which occur between April 1, 2021 and October 1, 2022 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 April 1, 2021 through October 1, 2022 through physical inspection or through a sales questionnaire, including an updated digital image of each sale property.
- Prepare and mail income and expense surveys (unless already completed by Assessor) to all commercial and industrial property owners for the 2021 calendar year, 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, 2023.

REQUEST FOR PROPOSAL REVALUATION SERVICES

2. <u>CURRENT PROGRAM</u>

The Town's current assessment database was originally established for the October 1, 2017 revaluation, and is maintained using Vision Appraisal CAMA Software 8. The 2017 revaluation included the inspection of all commercial/industrial properties, 3000 residential properties and all properties which sold in the 18 month period prior to October 1, 2017. 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 2019 based virtual server with six Windows 10 based staff workstations and three Windows 10 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 3.0.917.

The assessment mapping system is maintained by the Glastonbury Engineering Department. The Town of Glastonbury's planimetric data is based off of the 2014 aerial flyover. The town's most recent aerial photography is from the State of Connecticut 2019 Orthophotography. The Town maintains a GIS system using ArcGIS Desktop version 10.6.1, and data is stored in a ArcGIS Enterprise Geodatabase; and this information is integrated with the Vision Appraisal CAMA Software.

3. INSURANCE

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 the Respondent's Commercial General Liability and Automobile Liability policies. All policies should also include a Waiver of Subrogation in favor of the Town. <u>These requirements shall be clearly stated in the remarks section on the Respondent's Certificate of Insurance</u>. Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best's Rating of A-VIII with all policies written on an occurrence form basis. 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
 - \$1,000,000 each accident/\$1,000,000 disease-policy limit/\$1,000,000 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.

Respondents submitting a proposal for this solicitation are directed to respond online through a secure e-Procurement portal. Responses can be submitted at the following link: <u>https://app.negometrix.com/buyer/2832n</u>, under the RFP title "**RPGL-2022-01** – **Revaluation Services**". Respondents will be required to create a profile before submitting their proposal. Step-by-step instructions on how to register as a vendor are available at this website:

https://help.negometrix.com/en/support/solutions/articles/9000177626-register-on-negometrix4

Respondents will be required to upload their response in two (2) separate pdf files which includes the following:

- A <u>clearly marked</u> technical proposal
- A <u>clearly marked</u> 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 understanding of the Scope of Services and 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, email address 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.

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- 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 July 8, 2003 and effective August 1, 2003 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 Proposal Response Page (Attachment A). The selected Respondent will also be required to complete and sign an Acknowledgement Form prior to award. The Code of Ethics and the Acknowledgement Form can be accessed at the Town of Glastonbury website at <u>www.glastonburyct.gov</u>. Upon entering the website click on **Bids & Proposals Icon**, which will bring you to the links for the <u>Code of Ethics</u> and the <u>Acknowledgement Form</u>.

- 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.
- u. Any technical questions regarding this RFP shall be made in writing and directed to Nicole Lintereur, Assessor, by email at <u>nicole.lintereur@glastonbury-ct.gov</u>. For administrative questions concerning this proposal, please contact Mary F. Visone, Purchasing Agent, by email at <u>purchasing@glastonbury-ct.gov</u>. All questions, answers, and/or addenda, as applicable, will be posted on the Town's website at <u>www.glastonburyct.gov</u> (Upon entering the website click on Bids & Proposals icon, click on the <u>Bid Title</u> 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 respondents 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.

Preliminary Fee Proposal Instructions:

a. Respondent shall submit on your firm's letterhead, as a separate pdf file labeled 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 shall not be obligated to accept any proposal and the Town shall reserve the sole right to determine the appropriateness of any proposal for this work. 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.
- Detailed Project Work Plan 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 Selection 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

The Town intends to adhere to the schedule below as closely as possible, but reserves the right to modify the schedule in the best interest of the Town as required.

Publicize RFP	Date – April 21, 2021
RFP Due Date	Date – May 11, 2021 @ 11AM
Interviews with Top Respondents	Date – Week of May 24, 2021
Contract Effective Date	Date – August 2, 2021

ATTACHMENT A PROPOSAL RESPONSE PAGE



BID / PROPOSAL NO:	RPGL-2022-01	DATE DUE:	May 11, 2021
DATE ADVERTISED:	April 21, 2021	TIME DUE:	11:00 AM

NAME OF PROJECT: REVALUATION SERVICES

THE RESPONDENT ACKNOWLEDGES RECEIPT OF THE FOLLOWING ADDENDA:

Addendum #1 _____(Initial/Date) Addendum #2 _____(Initial/Date) Addendum #3 _____(Initial/Date)

It is the responsibility of the respondent to check the Town's website for any Addenda before submitting the proposal.

CODE OF ETHICS:

I / We have reviewed a copy of the Town of Glastonbury's Code of Ethics and agree to submit a Consultant Acknowledgement Form if I /We are selected. Yes _____ No _____ *

*Respondent is advised that effective August 1, 2003, the Town of Glastonbury cannot consider any proposal where the respondent has not agreed to the above statement.

Type or Print Name of Individual	Doing Business as (Trade Name)
Signature of Individual	Street Address
Title	City, State, Zip Code
Date	Telephone Number / Fax Number
E-Mail Address	SS # or TIN#

ATTACHMENT B 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 October 1, 2020):

CLASSIFICATION	# OF ACCOUNTS	% OF TOTAL
RESIDENTIAL		
Single family - Includes Pad & In-Law	10,128	69.7%
Condominiums - Includes Declared Garages	2047	14.1%
Multi-family - 2 To 4 Units	231	1.6%
Vacant	637	4.4%
TOTAL RESIDENTIAL	13,043	
COMMERCIAL/ INDUSTRIAL AND SPECIAL USE Apartments Commercial Buildings Condominiums - Commercial/Industrial Industrial / Public Utility Buildings Vacant - Com./Ind./Public Utility P.A. 490 - Farm & Forest	18 297 154 106 85 236	0.1% 2.0% 1.1% 0.7% 0.6% 1.6%
Tax Exempt – Improved & Vacant	595	4.1%
TOTAL COMM/IND/SPECIAL USE	1491	
	14 524	100.00/
TOTAL PARCELS	14,534	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 inspections will be performed in accordance with guidelines determined by the Assessor and in accordance with C.G.S. §12-62(2). It is anticipated that a limited group of properties exterior measurements will be a part of the inspection program. The selected company will issue and mail 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 April 1, 2021 and October 1, 2022, an additional 2000 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 April 1, 2021 and October 1, 2022 and an additional 2000 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 April 1, 2021 and October 1, 2022, 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 pdf document.

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. Option	\$ Numeric Amount	Written Dollar Amount
В.	All sales & Limited Res. Inspection Option	\$ Numeric Amount	Written Dollar Amount
C.	All Commercial Sales & Limited Inspection Option	\$ Numeric Amount	Written Dollar Amount
D.	Additional Inspections Option per each	\$ Numeric Amount	Written Dollar Amount

Submitted by:			
Name of Company:			
Name and Title of Agent		-	
Signature of Agent		_	
Telephone	Fax		
Email:			
Date:			

REQUEST FOR PROPOSAL REVALUATION SERVICES

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, 2019 through September 30, 2020 are as follows:

Total Real Estate Sales	664
Total "Useable" Sales	531
Median Sales Ratio – all useable sales (100% value)	94.5 %
Coefficient of Dispersion – all useable sales	10.0
Total Residential – Useable Sales	515
Median Selling Price – Residential	\$ 355,000
Minimum Sale price – Residential	\$ 87,000
Maximum Sale price – Residential	\$ 1,501,313
Median Sales ratio – Residential (100% value)	94.5 %
Coefficient of Dispersion – All Residential	8.11 %
Median Size- Single Family Detached (Sold)	2,388
Median Size – Residential Condominiums (Sold)	1,224
Median Year Built - All Residential (Sold)	1981
Median Year Built – All Residential	1976